

# NFC

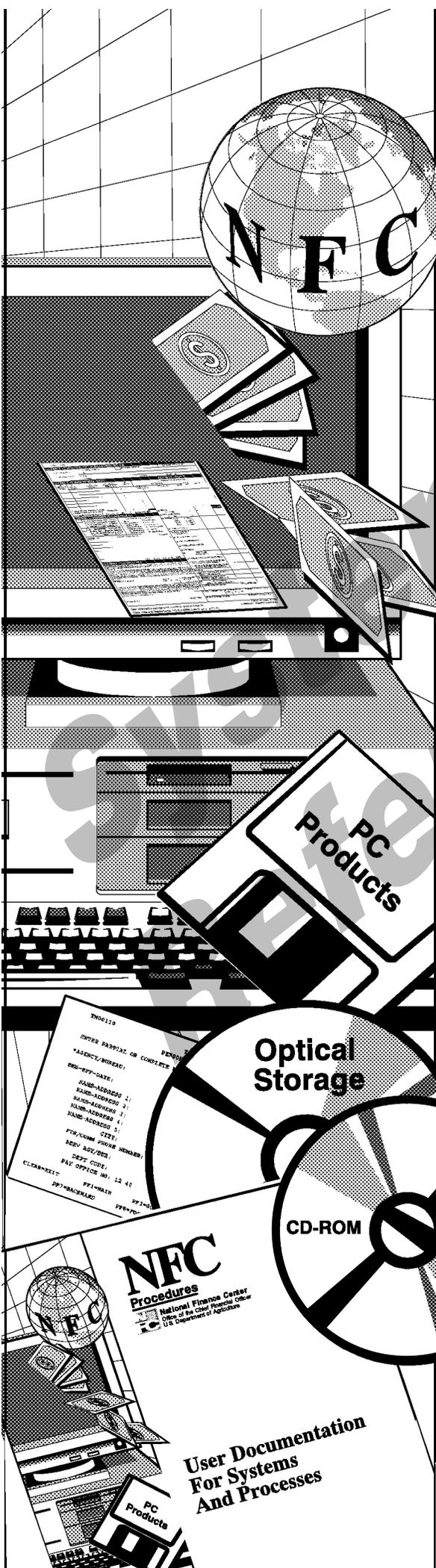
## Procedures



National Finance Center  
Office of the Chief Financial Officer  
U.S. Department of Agriculture

Updated August 2001

# Personnel Action Processing System (PACT)



TITLE I  
Payroll/Personnel Manual

CHAPTER 4  
Personnel Action Processing System (PACT)

User Documentation  
For Systems  
And Processes

**NFC**  
Procedures  
National Finance Center  
Office of the Chief Financial Officer  
U.S. Department of Agriculture

# User Survey For USDA/NFC Procedures

The Directives and Analysis Branch requests your comments on this procedure. To help us evaluate and improve the effectiveness of our publications, please answer the questions below.

Return the survey within 30 days to:

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 USDA/NFC  
 P.O. Box 60000  
 New Orleans, LA 70160-0001  
 └──────────────────────────────────┘

Personnel Action Processing  
 System (PACT)  
 Procedure Name  
 I / 4 / /  
 Title Chapter Section Subsection

**Optional:**

\_\_\_\_\_  
 User Name Phone No.  
 \_\_\_\_\_  
 Job Title Grade  
 \_\_\_\_\_  
 Address  
 \_\_\_\_\_  
 City State ZIP

**1. How helpful is the procedure to you in performing your job?**

- Very helpful
- Fairly helpful
- Not very helpful because \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**5. How frequently do you use the procedure?**

- Daily
- Weekly
- Monthly
- Other: \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**2. Is the format easy to follow?**

- Yes
- No, I suggest \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**6. Have you found any errors in the procedure?**

- No
- Yes \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**3. Is the writing easy to understand?**

- Yes
- No, I suggest \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**7. What recommendations/comments would you like to make regarding this procedure?**

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**4. Are the instructions/exhibits clear and easy to follow?**

- Yes
- No, I suggest \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

THANK YOU FOR COMPLETING THIS SURVEY!



### **Latest Update Information**

Title I, Bulletins 02-9, Changes Affecting Enrollment Under the Federal Employees Health Benefits (FEHB) Program, dated May 8, 2002, and 02-X, (FEHB) Program, dated XXXXXXXXXXXX, notified users of changes as a result of the Federal Employees Health Benefits Children's Equity Act, enacted October 30, 2000.

Listed below is a summary of the changes to the PACT procedure:

Description of Changes	Page
Adds Pay Plans OF and SS	29 - 30
Revised the definitions of the <a href="#">FEHB Coverage</a> Codes.	66 - 67

Additions and changes in the text are identified by “▶◀”.

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## About This Procedure

This data procedure provides instructions for accessing and operating the Personnel Action Processing System (PACT). The following information will help you to use the procedure more effectively and to locate further assistance if needed.

### How This Procedure Is Organized

- The primary sections of this procedure are described below:
- [System Overview](#) describes what the system is used for and provides related background information.
- [System Access And Security](#) provides access security information and instructions for accessing the system.
- [Operating Features](#) describes the system's design and how to use its operating features.
- The [PACT Menu](#) gives instructions for completing key fields, which are used to specify the employee record. Instructions for the Menu and Input Screens describe how to select (1) the type of personnel action to be entered and (2) the function. The Menu and Input Screens are presented as figures within the text.
- [PACT Data Elements](#) provides instructions for completing accession data elements and miscellaneous data elements. The accession data elements are listed in the order as they appear on the screens for an accession action. The miscellaneous data elements, which are displayed for personnel actions other than accessions, are listed in alphabetical order. An index provides the page number for locating a specific data element quickly.
- [Appendixes](#) contains reference information for 900 series nature of action codes and PACT edit messages.
- [Heading Index](#) provides an alphabetical list of all headings in the procedure. When a heading is referenced, you can use this index to locate the page number.

### What Conventions Are Used

This procedure uses the following conventions:

- Messages displayed by the system are printed in *italics*. Example: The message *Delete Successful* is displayed.

- Field specifications are also printed in *italics*. Example: Percent (*numeric field; 2 positions*). Key in the percentage amount of the retention allowance or supervisory differential.
- Data that is system generated or that you must key in exactly as shown is printed in ***bold italics***. Example: Key in ***01***.
- Emphasized text within a paragraph is printed in **bold**. Example: Process a correction to the time off award (002/872) **without canceling** the name change.
- Figure references printed in bold link the figures with the text. Example: The Add Update Action screen (**Figure 5**) is displayed.
- References to sections within the procedure are printed in bold. Example: See **Adding The Personnel Action**.
- Keyboard references are printed in brackets. Example: Press [Enter]. Press [PF5].
- Optional actions at the end of a processing function are preceded by square bullets. Example:
  - To exit the system, Press [Clear].
- Important extra information is identified as a note. Example: **Note:** Intermittent and Senior Executive Service (SES) employees are not eligible to receive time off awards.

### Who To Contact For Help

For questions about this procedure, contact the Directives and Analysis Branch at **504-255-5322**.

For questions about payroll/personnel policies and regulations, contact your Committee For Agriculture Payroll/Personnel System (CAPPS) representative.

For questions about NFC processing, contact the Payroll/Personnel Operations Section at **504-255-4630**.

For access to PACT, contact your agency's ADP security officer.

For questions about the system (including help with unusual conditions), contact Customer Support personnel at **504-255-5230**.

## System Overview

This procedure provides instructions for processing personnel actions including accessing and using the Personnel Action Processing System (PACT).

PACT is an online remote entry system of the U.S. Department of Agriculture's (USDA) Payroll/Personnel System and is used to enter personnel actions. PACT is a nature of action/authority code driven system; that is, the nature of action and authority code entered on the PACT menu determine the input screen that is displayed.

Personnel actions fall into four categories:

- (1) accession actions,
- (2) change actions,
- (3) separation actions,

The above are all considered to be official actions (i.e., nature of action code (NOAC) and authority code(s) are required),

- (4) update actions, which are unofficial actions (i.e., NOAC and authority code(s) are not required).

PACT interfaces with the following systems:

**Position Management System (PMSO).** PMSO is an online system that gives users the ability to add, change, inactivate, reactivate, and delete positions. Position data and employee data are entered separately. Position data is entered first through PMSO; then employee data is entered through PACT. Position and employee data are linked during the processing of the Personnel Edit Subsystem (PINE).

The following key elements must be entered in PMSO and PACT to link position data to personnel data:

Department Code  
Agency/Bureau Code  
Personnel Office Identifier  
Master Record Number  
Grade  
Individual Position Number

When the following data elements are changed in PMSO, a personnel action must be entered in PACT and successfully processed through PINE to update the employee's database record.

### Master Record

Pay Plan  
Occupational Series Code  
Occupational Function Code

### Individual Position

FLSA Code  
Organizational Structure Code  
Duty Station Code  
Pay Table Code

Bargaining Unit  
Status Code  
LEO Indicator  
Interdisciplinary  
Occupational Series  
Code

Position Supervisory Code

PATCO Code

If the personnel action is not processed, a message appears on the Listing of Personnel Error Messages report. When this message appears on the suspense report, an official personnel action must be processed to resolve the message. This message will remain on the suspense report indefinitely until the personnel action is processed. For detailed information, see the PMSO procedure.

**Entry Processing Inquiry And Correction system (EPIC).** EPIC is an entry system deployed in a Windows environment that allows agencies to enter, correct, retrieve, and inquire key position data, personnel and payroll data, and execute payroll/personnel status and suspense reports. For detailed information, see the EPIC procedure.

**Front-End System Interface (FESI).** FESI is an alternate method that can be used to enter position data and personnel data. FESI enables agencies to transmit their data daily through batch submissions. Agencies using FESI receive confirmation reports showing the types of documents transmitted, a count of records transmitted to NFC, and any errors encountered during transmission.

Position data entered in FESI that does not pass the edit process is placed in the Suspense Inquiry and Correction System (SINQ) and a PINE edit message appears on the Listing of Personnel Error Messages Report. Document Type 998, Front-End Systems Interface (FESI) Position Data, identifies position data that was released through FESI but failed the PINE edits. Users must **(1)** correct the position data in their front-end system and transmit a new record to NFC, or **(2)** use PMSO to update or establish the position data. Position data that fail edits **cannot** be corrected in SINQ.

Suspense reports should be requested from the Report Generator System (CULPRPT) by using Option (4), Error Suspense Reports. Position data entered through FESI is identified on the CULPRPT reports by special batch number 67 (e.g., CULPRPT Report U6701, SINQ 67 Listing Of Personnel Error Messages). If a batch number begins with 67, the document is held in the SINQ suspense for one pass and is coded for deletion (override code 4).

**Table Management System (TMGT).** TMGT is an online system that contains valid values and descriptions for certain fields on personnel actions entered through PACT. Certain fields in PACT are validated

against TMGT (e.g., agency and personnel office identifier, salary tables, etc.). When errors occur, users can verify the data against TMGT. For detailed information, see the TMGT procedure.

**Personnel Edit Subsystem (PINE).** PINE performs edits on the personnel actions entered through PACT before they are applied to the Payroll/Personnel database. PINE processes personnel and payroll documents Monday through Friday of each week and on the first Saturday of the pay period, regardless of the effective pay period.

Of the actions that pass PINE edits, those with a current or prior effective pay period are sent to the Personnel Processing System (PEPL) to update the Payroll/Personnel database; those with future effective pay periods are placed in the future file. Personnel actions that fail PINE edits are placed in the Suspense Inquiry and Correction System (SINQ) database. For detailed information, see the SINQ procedure.

**Personnel Processing System (PEPL).** PEPL performs the update functions of the personnel areas of the database. All documents successfully processed through PINE are then processed through PEPL for update or modification of database elements. PEPL retains personnel transactions that have been processed and applied to the Payroll/Personnel database. The data is retrieved from PEPL during the pay period and displayed in the Information/Research Inquiry System (IRIS). PEPL also produces a log of all transactions applied to the database as well as statistics and management reports.

**Future Inquiry System (FINQ).** FINQ is an online system that allows users to view actions in the future file during the current processing pay period. Future actions processed through PACT and then successfully processed through PINE are applied to the future file and are held until the effective processing pay period. Future actions that fail the PINE edits are placed in SINQ. The actions held in FINQ are reedited through the first pass of PINE each pay period until they are applied to the Payroll/Personnel database. For detailed information, see the FINQ procedure.

**Suspense Inquiry And Correction System (SINQ).** SINQ is an online system that allows users to view and correct personnel actions in the SINQ database. Personnel actions that do not successfully process in PINE are placed in the SINQ database until errors are corrected. An error suspense report can be produced through the Payroll/Personnel Report Generator System (CULPRPT) that identifies errors with SINQ messages. The SINQ messages, with requirements for corrective action, are described in Title 1, Chapter 10, Section 2,

Personnel Edit Subsystem (PINE) Edit Messages. After successful correction through SINQ, the personnel actions are returned to PINE, reprocessed, and depending upon the effective pay period, are applied to the Payroll/Personnel database or the future file. For detailed information, see the SINQ procedure.

**PEP51 Pullers For Payroll/Personnel Documents (PEP51).** PEP51 is an online system used to (1) delete from the Payroll/Personnel database personnel actions that were applied in the current processing pay period and place them in SINQ, (2) delete, correct, or view documents in the future file, or (3) hold documents currently in suspense one pass only or indefinitely. For detailed information, see the PEP51 procedure.

**Payroll/Personnel Inquiry System (PINQ).** PINQ is an online system used to view the employee's current and historical personnel data contained in the Payroll/Personnel database. Most of the data displayed in PINQ is the result of payroll/personnel transactions entered through a remote entry system or by magnetic tape and then processed in the Payroll/Personnel System. Some of the data displayed in PINQ is generated as a result of data entered through PACT, PRES, EPIC, and other systems (e.g., after the health benefit form is processed, 1 (enrolled) is displayed in the FEHB Coverage Code field in the database). For detailed information, see the PINQ procedure.

**Information/Research Inquiry System (IRIS).** IRIS is an online inquiry system that provides immediate access to both current and historical payroll/personnel data and replaces the History Inquiry System (HINQ) and the Payroll/Personnel Inquiry System (PINQ). The data displayed in IRIS is the result of payroll/personnel transactions processed in the Payroll/Personnel System. For detailed information, see the IRIS procedure.

**Information/Research Inquiry System With Graphical User Interface (IRIS-GUI).** IRIS-GUI provides IRIS users with an up-to-date interface that (1) presents data in a user-friendly, Windows-type format and (2) integrates and uniformly displays information from multiple environments, including personal computers (PC), local area networks, and midrange and mainframe systems. IRIS-GUI displays payroll/personnel information from the IRIS mainframe system. With IRIS-GUI, users can query and view IRIS mainframe data in the Windows environment on their PCs. For detailed information, see the IRIS-GUI procedure.

**Payroll/Personnel Report Generator System (CULPRPT).** CULPRPT is an online reporting system that can be used to generate status reports of PACT doc-

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**Personnel Action Processing System**

uments. Users may request automatic generation and remote printing of status reports using TMGT, Table 022, Payroll/Personnel Documents Reports. The reports may be routed to a designated printer by submitting a one-time request on Form AD-962, Payroll/Personnel Document Reports Election Form, to the National Finance Center (NFC).

The reports, available in five different formats, are:

**Rept. No. Description**

- E0001 PACT/PRES - Status of PACT/PRES Docs by SSN
- E0002 PACT/PRES - Status of PACT/PRES Docs by Form No.

E0003 PACT/PRES - Status of PACT/PRES Docs by Status Code

E0004 PACT/PRES - Status of PACT/PRES Docs by Effective PP

E0005 PACT/PRES - Status of PACT/PRES Docs by User-ID

CULPRPT Report P0099, Error Analysis for T&A Processing, which identifies T&A's in suspense because a personnel action must be processed, should also be used in conjunction with the reports listed above.

To obtain these reports, use the instructions in the CULPRPT procedure.

## System Access And Security

Security is designed to prevent the unauthorized use of systems and databases. For security information, including user identification numbers (user ID's), passwords, and obtaining access to a specific system, see the Security Access procedure, **Title V, Chapter 1, Section 1**.

## Database Security

The following information describes the security environment at NFC.

**Security Software.** System security at NFC is managed by Computer Associate's (CA) TOP SECRET, a commercial access control package operated in an Operating System (OS) environment. CA TOP SECRET provides protection for datasets, library programs, input/output devices, and most system resources. It also controls access to data processing resources and facilities through a three-step process as follows:

1. CA TOP SECRET validates the user to determine if he/she is authorized to use PACT. The user's logon access (user ID and password) is validated during the logon process.
2. CA TOP SECRET confirms that the user is authorized to use the requested facility.
3. CA TOP SECRET determines if the user is authorized to use the requested resources (i.e., datasets, programs, transactions, database subschemas, Security Access Code (SAC), etc.).

**Validation Process.** To facilitate access to NFC-maintained systems, significant interaction/interface among software packages is necessary to control access. The following steps occur during a sign-on to PACT.

1. The individual is prompted to an ID, password, and application name.

2. At the Enter Application Name field, the user types in **PACT**.

3. CA TOP SECRET validates the ID, password, and access authorization to PACT.

4. Upon verification/validation of the ID and password, the individual is logged onto the NFC mainframe computer and into PACT.

5. IDMS security controls are then checked. The user must be established in the data dictionary (the user record name is the same as the accessor identification (ACID) name) in order to proceed.

6. The user is allowed to execute the PACT program, which will perform his/her assigned function as long as his/her security access for the program match.

7. The CA TOP SECRET profiles are used to determine if the user can access the subschema where the data is stored. The CA TOP SECRET user's permissions are read to determine if access is allowed.

**Note:** Steps 5 through 7 are transparent to the user.

**Requests for PACT Access.** Users **must** request access through their agency's NFC Security officer. The request for access should provide the following information:

- User Name
- User social security number
- User ID
- Agency Name
- User access request level (payroll/personnel)
- SAC definition
- Telephone Number
- Application Name (PACT)

**Note:** The access level requested for the user should be based on the individual's assigned work requirements and job functions.

### Sign-On

To access PACT, connect to your telecommunications network to display the NFC banner screen (**Figure 1**). Respond to the prompts as described below:

**1** Enter User ID (required, alphanumeric field; max. of 8 positions). Key in your assigned user ID (e.g., *NF999*). [Tab] to the next prompt.

**2** Password (required, alpha field; 6 to 8 positions). Key in your password. Your password is not displayed on the screen. [Tab] to the next prompt.

**3** New Password (optional, alpha field; 6 to 8 positions). This prompt is used when your current password has expired, and the system requests a new password. [Tab] to the next prompt.

**4** Enter Application Name (optional, alpha field; max. of 9 positions). Key in *PACT* and press [Enter]. The PACT menu is displayed, except when NFC needs to communicate special system function messages. In this case, the Electronic Access Bulletin Board screen is displayed. Read the message(s) shown and press [Enter]. The NFC Menu (**Figure 2**) is displayed. Press [Enter] again to display the PACT Menu.

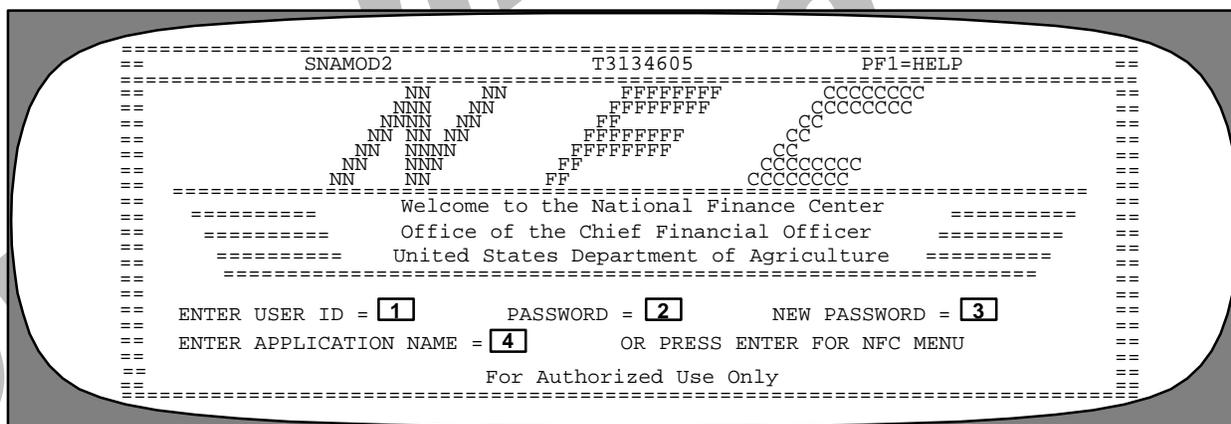


Figure 1. NFC Banner Screen

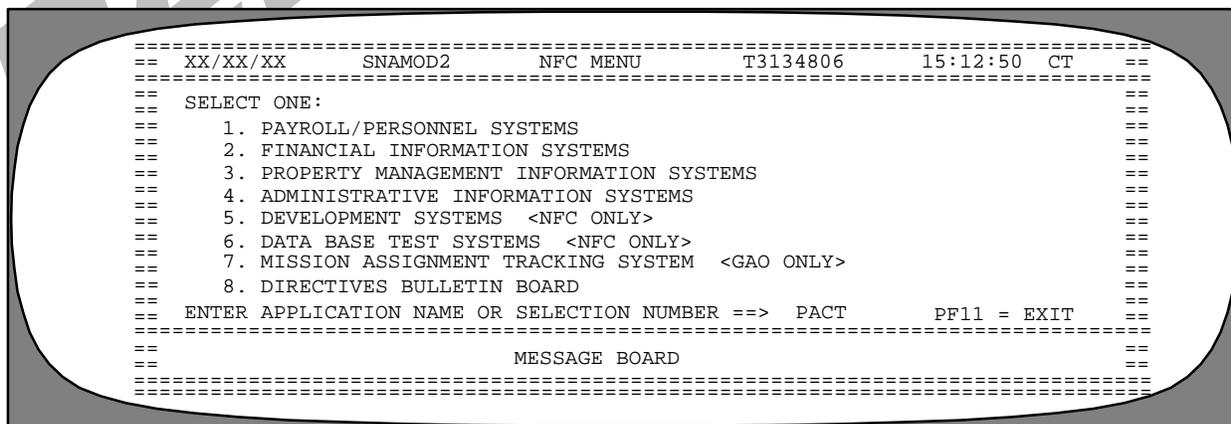


Figure 2. NFC Menu

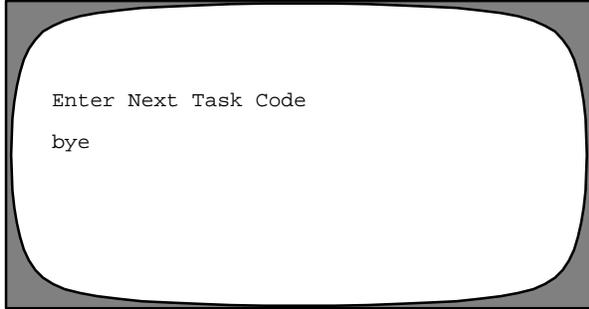
### Sign-Off

To exit PACT, press [Clear] at any screen. The Enter Next Task Code prompt (**Figure 3**) is displayed. Key in *bye* and press [Enter]. The NFC Menu is displayed.

You are now disconnected from PACT. However, you are still connected to the mainframe and may select another application from the NFC Menu.

To disconnect from the mainframe, press [PF11] or a compatible function key. The NFC banner screen is dis-

played. If you do not intentionally disconnect from the mainframe, you are automatically disconnected after your terminal is inactive for a short time.



**Figure 3. Enter Next Task Code Prompt**

## Operating Features

This section describes operating features used throughout the system.

### Help Screens

Help screens are available for all entry fields displayed on the screens. To obtain a Help screen, position the cursor on the field in question and press [PF5]. The Help screen is displayed and provides a description of the field either in narrative format or by listing the valid entry codes. Press [Enter] to return to the previous screen.

The Table Management System (TMGT) may also be used as a reference to complete the NOAC input screen. For detailed information, see the TMGT procedure.

### System Edits

All personnel actions entered in PACT are subject to front-end system edits. If an error occurs or if required data is omitted, an edit message is displayed at the bottom of the screen. All messages must be corrected before the PACT database is updated. (See Appendix B, [PACT Edit Messages](#).)

Personnel actions in the PACT database with an R (release) status code are released to PINE with the first available run. If the data passes PINE edits, the actions with a current or prior effective date are sent to PEPL to update the Payroll/Personnel database; actions with a future effective pay period are placed in the future file; if the actions fail PINE edits, the actions are placed in the SINQ database. For detailed information on SINQ messages, see the SINQ procedure.

### Function Keys

The program function keys are used to execute functions and display specific screens in the system. They are usually identified by [PA] (program attention), [PF] (program function), [SF] (special function), or [SP] (special program), depending on the equipment being used. Other function keys are [Enter], [Clear], and [Tab]. For instructions on your equipment usage, see the manufacturer's operating guide. The functions of applicable PF keys are displayed to the right of each screen.

Function keys used in PACT are as follows:

Key	Function(s)
	Used to display the PACT menu. <b>Note:</b> When PF1 is used to return from Document Type 063, Personnel Action Input, to the PACT menu, all the data that was previously entered is not displayed. The user must reenter the data.
	Used to display the Remarks Entry Screen.
	Used to display the Add Retained Information screen after data is successfully added in PACT for Nature of Action Codes 740, 741, 713, 866, and all of the 500 series nature of action codes.
	Used to display the Help screen.
	Used to display the next screen when more than one mass (list) action is processed.
	Used to return to Screen 1 of a NOAC input screen and Document Type 063.
	Used to display Screen 2 of a NOAC input screen, Remarks entry screen, and Document Type 063.
	Used to display Screen 3 for Document Type 063.
	Used to process data.
	Used to display the Enter Next Task Code prompt.
	Used to move the cursor from one field to the next.

## PACT Menu

After you access PACT, the PACT menu (**Figure 4**) is displayed showing key fields, e.g., SSNO, Dept/Agcy, etc., used to specify the employee record, the type of personnel action, and the function to be executed.

### Menu And Input Screens

Key fields are also used to select (1) the type of personnel action to be entered and (2) the function (add, change, query, or delete) to be executed.

Data entered in the NOA Code and Auth Code key fields determines the unique input screen that is displayed for each personnel action. Each input screen shows only those data elements relative to that action. However, the key fields (SSNO, Dept/Agcy, etc.) from the menu are displayed at the top of all the screens for official actions and most key fields are also displayed for update (unofficial) actions. Since PACT contains hundreds of unique input screens, this procedure provides representative examples to illustrate general entry instructions.

PACT will default to Document Type 063, Personnel Action Input, for the NOAC's not included in PACT. Users must then complete the fields necessary for the particular NOAC and authority codes entered.

### Key Fields

The PACT menu displays the same data entry fields throughout the system. For purposes of this procedure, these fields are referred to as key fields.

Instructions on key fields for adding, changing, viewing (querying), and deleting a personnel action from the PACT database are:

**1 SSNO** (required, numeric field; 9 positions). Key in the employee's social security number.

**2 Dept/Agcy** (required, alphanumeric field; 4 positions: Dept=2, Ag=2). Key in the department and agency code.

**3 POI** (required, numeric field; 4 positions). Key in the personnel office identifier code.

**4 Eff Pay Period** (required, numeric field; 2 positions). Key in the effective pay period for the personnel action being processed.

**5 Auth Date** (required, numeric field; 6 positions). Key in the authentication date for the personnel action in month, day, and year order.

**6 Function** (required, alpha field; 1 position). Key in **A** (add). **Note:** This field indicates the function to be executed. Valid values are **A** (add), **C** (change), **D** (delete), and **Q** (query).

**7 Oper Initials** (required, alpha field; max. of 3 positions). Key in your initials.

**8 Update Action Code (Y or N)** (optional, alpha field; 1 position). If the personnel action is unofficial, (i.e., an update action), key in **Y** (yes) and press [Enter]. The Add Update Action screen (**Figure 5**) is displayed. **Note:** Nature of Action (NOA) code and authority codes do not apply to update actions; therefore, for update actions, skip to the instructions following NOA Code and Auth Code fields below. If the personnel action is official (i.e., required by OPM), leave blank and precede with the Next Document field.

```

01/01/00      PP00001M
FRIDAY
NNNNNNNN  FFFFFFFF  CCCCCCCC  SSSSSSSSS
NN  NN  FF  FF  CC  SS
NNNNNNNN  FFFFFFFF  CC  SS
NN  FF  FF  CC  SS
NN  FF  FF  CCCCCC  SS
                                FOR AUTHORIZED USE ONLY

      U. S. DEPARTMENT OF AGRICULTURE
      OFM - NATIONAL FINANCE CENTER
      PERSONNEL ACTION PROCESSING SYSTEM

SSNO          DEPT/AGCY          POI          EFF PAY PERIOD
AUTH DATE     FUNCTION          OPER INITIALS
UPDATE ACTION CODE (Y OR N)     NEXT DOCUMENT

1ST NOA CODE   1A AUTH CODE       1B AUTH CODE
2ND NOA CODE   2A AUTH CODE       2B AUTH CODE

FUNCTION CODES - A=ADD C=CHANGE Q=QUERY D=DELETE
DC904860 KEY IN REQUIRED DATA AND PRESS ENTER
    
```

**Figure 4. PACT Menu**

**9** **Next Document** (optional, alphanumeric field; 3 positions). This field is used to access PRES without exiting PACT, which makes it easier to enter payroll documents that accompany personnel actions. To access PRES, key in **001** to display the PRES Menu, or key in the document type code (if known). Press [Enter] to enter a payroll document through PRES. The PRES Menu or selected document type screen is displayed. To continue in PRES, see the Payroll/Personnel Remote Entry System (PRES) procedure, Title I, Chapter 5. If you do not want to access PRES, [Tab] through this field to the 1st NOA Code field.

**10** **1st NOA Code** (required, numeric field; 3 positions). Key in the first nature of action code (NOAC) for the personnel action being processed.

**11** **1A Auth Code** (required, alphanumeric field; 3 positions). Key in the authority code that relates to the first NOAC entered.

**12** **1B Auth Code** (optional, alphanumeric field; 3 positions). If the first NOAC has a second authority, key in the second authority code.

**13** **2nd NOA Code** (optional, numeric field; 3 positions). Key in the second NOAC for the personnel action being processed, if applicable.

**14** **2A Auth Code** (optional, alphanumeric field; 3 positions). Key in the first authority for the second NOAC, if applicable.

**15** **2B Auth Code** (optional, alphanumeric field; 3 positions). If the second NOAC has a second authority, key in the second authority code.

**Note:** For assistance in completing the key fields, move to the field in question and press [PF5] to display the Help screen. (For an example of a Help screen, see **Figure 6**).

Press [Enter]. The selected NOAC input screen is displayed. (For an example of an accession personnel action screen, see **Figures 7 and 8**).

**Note:** The Next Doc 063 has been added to the first PACT input screen for accession personnel actions and all of the PACT input screens for update, official change, and separation actions. After the personnel action has been successfully added in PACT, the Next Doc field can be used to access PRES without having to go back to the PACT menu.

```

PP60001M                                UPDATE ACTION
                                           (PF1=MENU)
SSNO          DEPT/AGCY          POI          EFF PAY PERIOD          (PF5=HELP)
AUTH DATE          FUNCTION          OPER INIT          (CLR=EXIT)
1ST NOA CODE          1A AUTH CODE          1B AUTH CODE
2ND NOA CODE          2A AUTH CODE          2B AUTH CODE
*****
NAME LAST          FIRST          MIDDLE
EDUCATIONAL LEVEL          YEAR DEG/CERT RECEIVED          CITIZENSHIP STATUS
INSTRUCTIONAL PROGRAM          TSP ELIGIBILITY CODE          SCD TSP
SCD RIF          SCD WGI          FEGLI COVERAGE AMOUNT
APPOINTMENT LIMITATIONS FULL DOLLARS          HOURS          DAYS
APPOINTMENT LIMITATIONS BALANCE DOLLARS          HOURS          DAYS
COMMENCING DATE OF SERVICE YEAR          PROB PERIOD START DATE
GRADE RETENTION EXP DATE          CAREER TENURE DATE
SPVR/MGRL PROB PERIOD STARTING DATE          ANNUAL LEAVE CATEGORY
ANNUAL LEAVE CODE 45 DAY          RNO CODE          HANDICAP CODE          SPEC EMP PGM CODE
SPECIAL EMPLOYEE CODE          COOP SHARE AMT          ANNUITANT SHARE AMT
SALARY SHARE CODE          QUARTERS DEDUCT AMOUNT          QUARTERS DEDUCTION CODE
COLA/POST DIFFERENTIAL CODE          UNIFORM SERVICE COMPONENT          FROZEN SERV
CREDITABLE MILITARY SERVICE          DATE RETIRED MILITARY SERVICE
SCD RETIREMENT          AGENCY USE          TRVL-ALLOW STATUS
    
```

Figure 5. Add Update Action Screen

```

PP005H1M          *** HELP SCREEN EDUCATION LEVEL ***          (PRESS ENTER)
                                                            ( TO RETURN )
-----
BLOCK            FIELD NAME (ABBREVIATION)                    SIZE
-----
05              EDUCATION LEVEL                               2

THE HIGHEST LEVEL OF THE EMPLOYEE'S EDUCATIONAL ATTAINMENT.

01 - NO FORMAL EDUCATION OR SOME          02 - ELEMENTARY SCHOOL COMPLETED - NO
    ELEMENTARY SCHOOL                      HIGH SCHOOL
03 - SOME HIGH SCHOOL                     04 - HIGH SCHOOL GRADUATE
05 - TERMINAL OCCUPATIONAL PROGRAM -      06 - TERMINAL OCCUPATIONAL PROGRAM -
    DID NOT COMPLETE                       CERTIFICATE OF COMPLETION
07 - SOME COLLEGE - LESS THAN 1 YEAR    08 - ONE YEAR OF COLLEGE
09 - TWO YEARS COLLEGE                   10 - ASSOCIATE DEGREE
11 - THREE YEARS COLLEGE                 12 - FOUR YEARS COLLEGE
13 - BACHELOR'S DEGREE                   14 - POST-BACHELOR'S
15 - FIRST PROFESSIONAL                   16 - POST-FIRST PROFESSIONAL
17 - MASTER'S DEGREE                     18 - POST-MASTER'S
19 - SIXTH YEAR DEGREE                    20 - POST-SIXTH DEGREE
21 - DOCTORATE DEGREE                     22 - POST-DOCTORATE
    
```

**Figure 6. Help Screen Education Level**

```

PP10101M          CAREER-COND APPT
                                                            (PF1=MENU)
SSNO              DEPT/AGCY          POI          EFF PAY PERIOD          (PF3=RMKS)
AUTH DATE         FUNCTION          OPER INIT
1ST NOA CODE      1A AUTH CODE       1B AUTH CODE          (PF5=HELP)
2ND NOA CODE      2A AUTH CODE       2B AUTH CODE          (PF8=SCRN2)
*****          NEXT DOC 063          (CLR=EXIT)
*****
NAME LAST          FIRST              MIDDLE
BIRTH DATE        EFFECTIVE DATE
PMSO KEY: DEPT    AGCY              POI          MR-NO          GRADE          SEX CODE
PAY PLAN          STEP              BASE SALARY    VERIFY SALARY
SALARY RATE CODE VETERANS PREFERENCE    TENURE GROUP
VETERANS PREFERENCE RIF    FEGLI COVERAGE    ADJ SALARY
ANNUITANT INDICATOR        PAY RATE DETERMINANT CODE
RETIREMENT COVERAGE        SCD-LEAVE
WORK SCHEDULE              DUTY HOURS PER PAY PERIOD
EDUCATIONAL LEVEL          YEAR DEG/CERT RECEIVED
INSTRUCTIONAL PROGRAM      CITIZENSHIP STATUS
VETERANS STATUS            TSP ELIGIBILITY CODE    SCD TSP
SCD RIF                  SCD WGI                  TYPE OF APPOINTMENT
FEHBA COVERAGE            LI COVERAGE AMOUNT      LOSING/GAINING DEPARTMENT
                                                            STATUS
    
```

**Figure 7. Add Career-Cond Appt, Screen 1**

```

PP10102M          CAREER-COND APPT
                                                            (PF1=MENU)
SSNO              DEPT/AGCY          POI          EFF PAY PERIOD          (PF5=HELP)
AUTH DATE         FUNCTION          OPER INIT          (PF7=SCRN1)
1ST NOA CODE      1A AUTH CODE       1B AUTH CODE          (CLR=EXIT)
2ND NOA CODE      2A AUTH CODE       2B AUTH CODE
*****
PROBATIONARY PERIOD START DATE          CAREER TENURE DATE
SPVR/MGRL PROB PERIOD STARTING DATE    ANNUAL LEAVE CATEGORY
LEAVE EARNING STATUS DURING PAY PERIOD  ANNUAL LEAVE CODE - 45 DAY
RACE AND NATIONAL ORIGIN                HANDICAP CODE          SPECIAL EMPLOYMENT PGMS CODE
SPECIAL EMPLOYEE CODE                   COOP SHARE AMT        ANNUITANT SHARE AMT
SALARY SHARE CODE                       HOURLY COOP AGREEMENT RATE - OVERTIME    HOLIDAY
QUARTERS DEDUCTION AMOUNT                QUARTERS DEDUCTION CODE
COLA/POST DIFFERENTIAL CODE              UNIFORM SERVICE COMPONENT
FROZEN SERVICE                            PREV RET COVERAGE     CREDITABLE MILITARY SERVICE
DATE RETIRED MILITARY SERVICE              SCD-RETIREMENT
DATE LAST ENTERED PRESENT GRADE
AGENCY USE                                REMARKS
    
```

**Figure 8. Add Career-Cond Appt, Screen 2**



**X (Already Released to PINE).** This code is system generated after the document is released to PINE. If *X* appears in the Status field, the document cannot be altered through PACT; it can only be viewed. After the pay period closes, all documents in *X* status are deleted from the PACT database. **Note:** Personnel actions in *H*,

*I*, *W*, or *S* status remain in the PACT database for only 60 days from the date of entry. After that time, the personnel actions are deleted from the PACT database without any notification to the user. The status code for these documents must be changed to **R** to release the document to PINE.

System Reference Only

## Accessions

The instructions in this section are based upon Office of Personnel Management (OPM) regulations, public laws, etc., and the processing requirements of the U.S. Department of Agriculture's Payroll/Personnel System. Departments and non-Federal agencies not governed by OPM may supplement this section with additional instructions authorized by their individual Department/Agency.

An accession personnel action is used to establish an employee in the Payroll/Personnel database. Accession personnel actions are entered in the Personnel Action Processing System (PACT), and payroll documents are entered in the Payroll/Personnel Remote Entry System (PRES). The Front-End System Interface (FESI) is an alternate method that can be used to enter position data and personnel data.

Form AD-1051, Personnel Source Document, may be used as a supplement to the SF-52, Request for Personnel Action, when entering the accession personnel action in PACT. The data present on Form AD-1051 and SF-52 relates to the data elements on the PACT input screens. For a complete list of data elements and data element descriptions, see [PACT Data Elements](#) in this chapter.

The Position Management System (PMSO) must be utilized with PACT or FESI to establish an employee in the Payroll/Personnel database. Position data, which consists of a master record and individual position, must be established in PMSO or FESI for each employee before an accession personnel action can be processed in PACT. A master record contains basic position data for multiple positions. The individual position provides data for a specific position.

Once the master record and individual position data are established in PMSO, and the accession personnel action is entered in PACT, the position data in PMSO is linked with the employee data during the processing of the Personnel Edit Subsystem (PINE).

Once the accession personnel action is released from PACT and the accompanying payroll documents (i.e., employee address, Form W-4, Federal Income Tax Certificate, etc.) are released from PRES, the data is edited in PINE. The accession personnel action and employee address are edited first. If they pass PINE edits, they are applied to the Payroll/Personnel database. All other accompanying payroll documents are then edited in PINE and processed.

If the accession personnel action fails PINE edits, it is held in suspense for correction in the Suspense Inquiry and Correction System (SINQ). All accompanying documents, including the employee address, are held in a pending accession file. These documents cannot be processed because the employee is not yet established in the Payroll/Personnel database. In this situation, only the accession personnel action appears on the suspense report Listing of Personnel Error Messages. The accession personnel action must be corrected through SINQ, pass PINE edits, and apply to the Payroll/Personnel database before the payroll documents will apply to the Payroll/Personnel database. When more than one personnel action is processed during the same processing pay period, and the actions are not entered in sequence according to the effective dates, the system will automatically roll back any actions processed out of sequential order.

Documents automatically placed in the pending accession file cannot be queried and should not be reentered since they will appear in SINQ as duplicates.

If an accession personnel action is rolled back in the PEP51 Pullers for Payroll/Personnel Documents (PEP51) program, all payroll and personnel actions entered for the employee are rolled back (deleted) from the database and placed in SINQ. The accession personnel action and all payroll documents will appear on the Listing of Personnel Error Messages with the message *In SINQ Due To Roll Back - Take Appropriate Action*. These documents will remain in suspense until corrective action is taken. For detailed information, see the PEP51 procedure.

## Welfare to Work Program

Presidential memorandum dated March 8, 1997, entitled, "Government Employment for Welfare Recipients," directs the Heads of Executive Departments and agencies to use all available authorities to hire people off of the welfare rolls into available positions within the Federal Government. To provide statistical information on the number of welfare recipients who are successfully employed by the Federal Government, the Office of Personnel Management will use Form OPM-1635, Welfare to Work Program. The completion of this form is voluntary and the information will be used for statistical purposes only and will not be used to identify individuals. Form OPM-1635 identifies whether or not the employee is receiving assistance under one of the following programs:

- The Temporary Assistance for Needy Families (TANF) program administered by a State under the Federal block grant
- Aid to Families with Dependent Children (AFDC)

- Tribal Temporary Assistance for Needy Families program administered by an eligible Indian tribe

The following Remarks Codes have been established in the Table Management System (TMGT), Table 052, Remarks Codes and Descriptions:

- Remarks Code 050 - The employee voluntarily completed Form OPM-1635 and checked Block A, which identifies that the employee is receiving assistance under the Temporary Assistance to Needy Families program (TANF), Aid to Families with Dependent Children (AFDC), or the Tribal Temporary Assistance for Needy Families program.
- Remarks Code 060 - The employee voluntarily completed Form OPM-1635 and checked Block B, which identifies that the employee is not receiving assistance under the Temporary Assistance to Needy Families program (TANF), Aid to Families with Dependent Children (AFDC), or the Tribal Temporary Assistance for Needy Families Program.

If the employee voluntarily completes Form OPM-1635, Remarks Code 050 or 060 must be entered in the Remarks Code field when the accession personnel action (with a nature of action code in the 100 series) is entered. The Remarks Codes will not be printed on the Standard Form 50-B, Notification of Personnel Action.

If the employee does not complete Form OPM-1635, the employing agency may not enter Remarks Code 050 or 060 on the accession personnel action.

### Special Processing Considerations

The following payroll documents must be processed in PRES and applied to the Payroll/Personnel database during the same processing pay period as the accession personnel action to ensure accurate computation of the employee's pay.

- Employee Address is used to establish the employee's residence address and a check mailing address if the employee elects to have the salary check delivered to a specified address other than a bank.
- SF-1199A, Direct Deposit Sign-Up Form, is used if the employee elects to have the salary check deposited directly into a bank, credit union, or other financial organization.

**Note:** The employee will not be paid if either the employee address or SF-1199A is not processed.

- Form W-4, Federal Income Tax Certificate, is used to establish the employee's Federal tax obligation. If Form W-4 is not processed during the same effective pay period as the accession personnel action, tax withholding will automatically be withheld based on single with zero exemptions.
- State Income Tax Certificate is used to authorize the voluntary state tax obligation (if applicable) of the employee's residence state. If the residence state has executed a withholding agreement with the Secretary of the Treasury, and the state income tax certificate is not processed during the same effective pay period as the accession personnel action, withholding will be made at the highest rate applicable for the state.

**Note:** The employee's residence address must be established in the database in order to successfully process a state income tax certificate. A waiver of state tax liability must also be processed for the duty station if the duty station is a taxable state and not the same as the residence state recorded on the employee's database salary record (IRIS Program IR101). If the duty station is a taxable state, the waiver of the duty station must be processed *PRIOR* to the processing of the voluntary residence state tax. For detailed information on state taxes, see the PRES procedure.

- Document Type 031, Master File Change Document, is used to establish year-to-date totals for certain deductions, e.g., county tax, retirement earnings, etc., if the employee is transferring into the USDA Payroll/Personnel System or transferring from one Department within the USDA Payroll/Personnel System.

### Cancellation Of Accession Personnel Actions

A cancellation of an accession personnel action can only be accomplished if:

1. the accession personnel action is the only official action that has been processed for the employee
2. a Time and Attendance (T&A) report has not processed for the employee, and
3. it is initiated during the same processing pay period as the accession personnel action and the employee's salary for the current processing pay period has not been computed by the Payroll Processing System (PAYE).

PEP51 is the only method to be used to cancel an accession personnel action. If the accession personnel action is successfully rolled back through PEP51, all payroll actions that were entered and applied during the same processing period will also be rolled back.

If PEP51 cannot be used to cancel the accession personnel action, refer to OPM processing instructions for correcting an accession personnel action with an official action.

### Manually Paid Employees

Personnel actions prepared for certain employees who will be paid manually, i.e., salary and other related payments are not processed through the Payroll/Personnel System, are paid through manual pay procedures. For example, manual payments are made each pay period or semi-monthly for employees:

- who will be serving more than one appointment **within the same agency** of a Department (dual appointments)
- who are paid semi-monthly
- who are stationed overseas and who are not payrolled by NFC
- who are assigned to one agency but paid from the funds of another agency
- who are paid entirely or partially in currency other than U.S. currency

The accession personnel action, which must have Special Employee Code 35, manually paid employee, and all related payroll actions (e.g., federal and state tax forms, FEHB, etc.) must be submitted to the following address:

Head, Payroll/Personnel Operations Section  
USDA, National Finance Center  
P.O. Box 60000  
New Orleans, LA 70160

For information on manually paid employees, see the Nonautomated Processing chapter.

### Nature Of Action Codes And Remarks Codes

The preparation and processing of all personnel actions require detailed information, which is accomplished through the use of nature of action codes and remarks codes. These nature of action and remarks codes are established by OPM.

The nature of action is a phrase that explains the basis (or reason) for the personnel action that is occurring, such as appointment or promotion. Each nature of action is identified by a unique three-digit numerical code that identifies the particular nature of action.

Each nature of action code has a separate, alphabetical or numerical code that describes the legal authority, i.e., the law, Executive Order, regulation, agency directive, or instruction under which the personnel action is taken.

Agencies and OPM use information derived from NOAC's and legal authorities to perform their personnel management functions and for statistical and data processing purposes.

Remarks codes are used to explain the action to the employee, the payroll office, future employers, OPM, and other Federal and non-Federal agencies. Specific remarks codes are always required for some actions; remarks codes for other actions will vary according to the employee's work history.

### Nature Of Action Codes - 900 Series

Nature of Action Codes (NOAC) in the 900 series may be used to document personnel matters that are of interest to a Department/agency and for which OPM does not require an SF-50, e.g., a Detail. When an SF-50 is prepared to document an agency action in the 900 series, the data on the SF-50 is not reported to OPM's Central Personnel Data File (CPDF). For a list of 900 series NOAC's, see **Appendix A, [Nature Of Action Codes - 900 Series](#)**.

### Agency Specific Remarks Codes

Agency specific remarks codes are established for use when a Department/agency determines that current remarks codes established by OPM do not meet the criteria needed for documenting certain personnel actions. To view valid remarks codes, see TMGT Table 052, Remarks Code and Descriptions.

**Adding The Personnel Action.** After you access PACT (see [System Access](#) in this chapter), the PACT menu (**Figure 4**) and key fields are displayed.

After completing the key fields on the PACT menu (for instructions, see [Key Fields](#)), press [Enter].

The appropriate NOAC input screen (**Figures 7 and 8**) will be displayed. The data elements will vary with each screen, depending on the NOAC and authority code(s) entered. Only those data elements required for the NOAC being processed will appear on the screens.

The [PACT Data Elements](#) section in this chapter contains completion instructions for accession data elements and miscellaneous data elements. The accession data elements, most commonly displayed in PACT for accession actions, are listed in the order as they appear on the screens for an accession action. The miscellaneous data elements, e.g., last day in pay status, classification action code, etc., are usually displayed for personnel actions other than accession actions. These data elements are listed in alphabetical order. All of the data elements are defined, and data entry instructions

are also provided, i.e., if entry is required for an (1) Accession, (2) Official Change, (3) Separation, or (4) if the data can be updated or corrected on an unofficial action. A complete list of all the data elements is provided to identify the page location of the individual data elements in this chapter.

After keying in all of the data, press [Enter]. If the document successfully passes system edits, the message *Document Successfully Added* is displayed at the bottom of the screen. If the data does not pass system edits, an edit message is displayed at the bottom of the screen. All messages must be corrected before the PACT database is updated.

- To add a personnel action for another employee, press [PF1] to return to the PACT menu and repeat the above process. Otherwise, press the applicable key as displayed at the right of the screen.

**Changing The Personnel Action.** The personnel action may be changed only if the document has not been released from the PACT database. Check the PACT/PRES status reports and verify the status code. If the status code is *X* (already released to PINE), the personnel action cannot be changed through PACT.

To change a personnel action in the PACT database, key in the exact information that was entered in the Add function with the exception of the Function field. Key in *C* at the Function field. Press [Enter]. The data from the previous entry is displayed with the message *Make Desired Changes and Press Enter*. Key in the new data over the existing data in accordance with the entry instructions above for [Adding The Personnel Action](#).

After all changes are made, press [Enter]. The message *Document Successfully Changed* is displayed at the bottom of the screen.

- To change a personnel action for another employee, press [PF1] to return to the PACT menu and repeat the process above. Otherwise, press the applicable key as displayed to the right of the screen.

**Deleting The Personnel Action.** The personnel action may be deleted only if the document has not been released from the PACT database. Check the PACT/PRES status reports and verify the status code. If the status code is *X* (already released to PINE), the personnel action cannot be deleted from PACT.

To delete a personnel action in the PACT database, key in the exact information that was entered in the Add or Change function with the exception of the Function field. Key in *D* at the Function field. Press [Enter]. The data from the previous entry is displayed with the message *Document Found - Review and Press Enter to Delete*. Press [Enter]. The message *Document Successfully Deleted* is displayed at the bottom of the screen.

- To delete a personnel action for another employee, press [PF1] to return to the PACT menu and repeat the process above. Otherwise, press the applicable key as displayed to the right of the screen.

**Viewing The Personnel Action.** To view a personnel action in the PACT database, key in the exact information that was entered in the Add or Change function with the exception of the Function field. Key in *Q* at the Function field. Press [Enter]. The data from the previous entry is displayed with the message *Document Found*.

- To view a personnel action for another employee, press [PF1] to return to the PACT menu and repeat the process above. Otherwise, press the applicable key as displayed to the right of the screen.

### **PACT Data Elements**

This section contains completion instructions for accession data elements and miscellaneous data elements.

The accession data elements, most commonly displayed in PACT for accession actions, are listed as they appear on the screens.

The miscellaneous data elements, e.g., last day in pay status, classification action code, etc., are usually displayed for other types of personnel actions. These data elements are listed in alphabetical order.

Each data element is defined. Completion instructions explain what type of data is required. Additional information and entry instructions are also provided, i.e., if entry is required for an (1) Accession, (2) Official Change, (3) Separation, or (4) if the data can be updated or corrected on an unofficial action. Completion instructions may also contain special processing considerations and helpful hints.

The PACT data elements are listed individually in the **Index**.

---

**Name Last, First, Middle** (Three separate alphanumeric fields; Last = max. of 17 characters, First = max. of 12 characters, Middle = max. of 12 characters). Used to record the name by which an employee is known or designated on all official transactions

---

### Completion Instructions

- Enter items such as *Jr*, *Sr*, or *III* one space after the last names. If there is more than one space, the additional item will not print on the SF-50-B.
- If the employee has a two-part last name (e.g., Smith Martin), use a space to separate the two parts. Do not use any type of punctuation (e.g., a hyphen, period, etc.) to separate the two names.
- If the employee has two or more first names or initials (e.g., John Paul or J P) and each is to be shown, use a space to separate the two names. Do not use any type of punctuation (e.g., a hyphen, period, etc.) to separate the two names or initials.
- If the employee has two or more middle names or initials (e.g., Ann Marie or A M) and each is to be shown, use a space to separate the two names or initials. Do not use any type of punctuation (e.g., a hyphen, period, etc.) to separate the two names or initials. Leave the middle name blank if the employee has no middle name or initial.

### Additional Information

- For processing and reporting purposes, the employee's last name must be limited to 17 characters, and the first and middle names limited to 12 characters.
- Only a total of 25 characters are actually printed on the salary check. If the name exceeds 25 characters, the first name will be reduced and printed as an initial.
- When the SF-50-B is printed, the entire name is limited to 35 characters; the name will be adjusted as described above.

- A space counts as one character. For long names, ask the employee to decide on an abbreviation.
- Do not include titles, such as Mr., Mrs., Ms., Dr., Prof., etc., as part of the name.
- To **correct the name**, process a correction to the last official action.
- To **change the name**, process an official change action using NOAC 780, Name Change From.
- Once the employee is established in the Payroll/Personnel database, the name will be generated on all actions entered in PACT. If the name is not generated, either the Employee Name database is unavailable or the employee is not established in the Payroll/Personnel database. Always verify that the generated name agrees with the social security number that is entered.

### Data Entry

*Accession:* Required.

*Official Change:* System generated after SSNO is verified against the Employee Name database. Required if (1) correcting the name (**Y** must also be entered in the Name Correction field), (2) processing a name change (Remarks Code 247 must also be entered), or (3) if the Employee Name database is unavailable.

*Separation:* System generated after SSNO is verified against the Employee Name database. Required only if the Employee Name database is unavailable.

*Updating Action:* System generated after SSNO is verified against the Employee Name database. Required only if the Employee Name database is unavailable.

---

**Birth Date** (*numeric field; 6 positions*). Used to identify the employee's date of birth.

---

**Completion Instructions**

Enter the employee's date of birth as 6 numeric characters in month, day, and year order (e.g., **060994**). Do not enter any punctuation.

**Additional Information**

- The birth date provides a means of identifying employees with the same or similar names.
- This date is part of the criteria used in the preparation of statistical reports to determine retirement eligibility.

To correct or change the birth date, process an official change action.

**Data Entry**

*Accession:* Required

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* N/A

*Updating Action:* N/A

---

**Effective Date** (*numeric field; 6 positions*). Used to identify the effective date of the personnel action.

---

### Completion Instructions

Enter the effective date as 6 numeric characters in month, day, and year order (e.g., **060994**). Do not enter any punctuation.

### Additional Information

The effective date of any action should be the first day of the effective processing pay period.

If the effective date is other than the first Sunday of the processing pay period, a split Time and Attendance Report (T&A) may be required if the personnel action involves any one of the following:

- The employee's rate of pay is changing.
- The employee is being moved either within an agency or between agencies in a Department, except where it is an inter-agency move which does not change the employee's grade or salary, T&A contact point, organizational structure code, position number, or duty station.
- The employee is being terminated and rehired within the same pay period.
- The employee's type of retirement coverage is being changed from FICA to Civil Service Retirement, or vice versa.
- The employee's work schedule is being changed and the change will affect the employee's leave accrual.
- The employee's service year beginning date is being changed and his employment is subject to an hourly, daily, and/or monetary limitation.

- Any change not listed in the situations listed above that would impact the employee's leave accrual.

For detailed information on split T&A's, see the T&A procedure.

If the action is an official change action, the date must be equal to or later than the effective date of the last official action recorded on the employee's database. If the effective date is earlier than the date of the last official action processed, the processing action will not pass PINE edits and will reject in SINQ.

**Note:** When more than one personnel action is processed during the same processing pay period, and the actions are not entered in sequence according to the effective dates, the system will automatically rollback any actions processed out of sequential order.

If the action is a correction action, the date must be the same as the date shown on the official action being corrected.

If the action is an official cancellation action, the date must be the same as the date shown on the official action being cancelled.

### Data Entry

*Accession:* Required

*Official Change:* Required

*Separation:* Required

*Updating Action:* N/A

---

**Sex Code** (*alpha field; 1 position*). Used to identify the employee's sex.

---

**Completion Instructions**

Enter one of the following codes:

**Code Definition**

*F* Female

*M* Male

**Data Entry**

*Accession:* Required

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* N/A

*Updating Action:* N/A

---

**PMSO Key: Dept** (*alpha field; 2 positions*). Used to identify the unique identification of the Department to which the employee is assigned. For detailed information, see the PMSO procedure.

---

#### Completion Instructions

- Enter the two characters assigned for the Department code.
- To view valid Department codes, see TMGT, Table 14, Department Codes.

#### Additional Information

- A split Time and Attendance Report (T&A) may be required if the effective date of the personnel action, which is changing or correcting this field, is other than the first Sunday of the processing pay period. For

detailed information on split T&A's, see the T&A procedure.

#### Data Entry

*Accession:* Required

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* N/A

*Updating Action:* N/A

---

**PMSO Key: Agcy** (*alphanumeric field; 2 positions*). Used to identify the agency to which the employee is assigned. For detailed information, see the PMSO procedure.

---

#### Completion Instructions

- ❑ Enter the two characters assigned for the first administrative subdivision of the Department in which the employee is assigned.
- ❑ To view valid agency codes, see TMGT, Table 023, Agency/Bureau.

#### Additional Information

- ❑ This code is the 1st level of the organizational structure code.
- ❑ The codes in Table 023, which are the only codes accepted in the Payroll/Personnel System, may be different than the agency codes assigned by OPM. When these codes are different, the code assigned by OPM is reported to the employee's CPDF and the agency code recorded in Table 023 is shown on all other output.

- ❑ A split Time and Attendance Report (T&A) may be required if the effective date of the personnel action, which is changing or correcting this field, is other than the first Sunday of the processing pay period. For detailed information on split T&A's, see the T&A procedure.

#### Data Entry

*Accession:* Required

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* N/A

*Updating Action:* N/A

---

**PMSO Key: POI** (*numeric field; 4 positions*). Used to identify the personnel office to which the employee is assigned. For detailed information, see the PMSO procedure.

---

#### Completion Instructions

- Enter the four characters assigned to the personnel office the employee is assigned to.
- To view valid personnel office identifiers, see TMGT, Table 001, Personnel Office Identifier Name And Address.

#### Additional Information

- A split Time and Attendance Report (T&A) may be required if the effective date of the personnel action, which is changing or correcting this field, is other than

the first Sunday of the processing pay period. For detailed information on split T&A's, see the T&A procedure.

#### Data Entry

*Accession:* Required

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* N/A

*Updating Action:* N/A

---

**PMSO Key: MR-NO** (*alphanumeric field; max. of 6 positions*). Used to identify the master record for the position the employee is occupying. For detailed information, see the PMSO procedure.

---

### Completion Instructions

Enter up to a maximum of six characters. Spaces are allowed, and letters as well as numbers may be used, separately or combined.

### Additional Information

Position data is separated into two records in PMSO: a master record and an individual record.

- The master record is a standard position that contains basic position data for separate or multiple individual positions.
- The individual position, which identifies the specific position the employee actually occupies, is linked to the master record.

A master record must be established in PMSO before the individual position can be established.

Verify the master record and individual position in PMSO to ensure the position is vacant and active before

any type of personnel action requiring PMSO data, such as an accession, official change action (promotion, change to lower grade, etc.) or cancellation, is processed.

A split Time and Attendance Report (T&A) may be required if the effective date of the personnel action, which is changing or correcting this field, is other than the first Sunday of the processing pay period. For detailed information on split T&A's, see the T&A procedure.

### Data Entry

*Accession:* Required

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* N/A

*Updating Action:* N/A

---

**PMSO Key: Grade** (*numeric field; 2 positions*). Used to identify the employee's grade. For detailed information, see the PMSO procedure.

---

### Completion Instructions

- Enter the two-digit grade, preceding single digits with a zero.
- When processing certain types of official change actions, e.g., a quality increase, the grade may be entered without other PMSO key data elements present. If the grade is entered, data must also be entered for the pay plan, step, and salary.
- Enter **00** if the employee is in the Senior Executive Service (Pay Plan ES) or if the position has no grade level.
- For executive level employees (Pay Plan EX), enter the level as the grade (e.g., Executive Level IV would be entered as **04**).
- For employees who are entitled to grade retention under 5 U.S.C. 5362, enter the grade of the position they actually occupy (the grade recorded in the employee's database retained grade data record (IRIS Program 128) and in PMSO), not the grade they are retaining for pay and benefit purposes.
- When the nature of action code on the processing personnel action is for a termination of grade retention, the

grade on the processing action must be the same as the grade on the employee's database retained grade data record (IRIS Program 128).

### Additional Information

- The grade is edited in PACT against the pay plan, step, and salary entered in PACT.
- A split Time and Attendance Report (T&A) may be required if the effective date of the personnel action, which is changing or correcting this field, is other than the first Sunday of the processing pay period. For detailed information on split T&A's, see the T&A procedure.

### Data Entry

*Accession:* Required

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* N/A

*Updating Action:* N/A

---

**PMSO Key: IP-NO** (alphanumeric field; max. of 8 positions). Used to identify the individual position the employee is occupying. For detailed information, see the PMSO procedure.

---

### Completion Instructions

☐ Enter up to a maximum of 8 characters. Spaces are allowed, and letters as well as numbers may be used, separately or combined.

### Additional Information

☐ Position data is separated into two records in PMSO: a master record and an individual record.

- The master record is a standard position that contains basic position data for separate or multiple individual positions.
- The individual position, which identifies the specific position that the employee actually occupies, is linked to the master record.

☐ A master record must be established in PMSO before the individual position can be established.

☐ Verify the master record and individual position in PMSO to ensure the position is vacant and active before any type of personnel action requiring PMSO data, such as an accession, official change action (promotion, change to lower grade, etc.) or cancellation, is processed.

☐ Whenever a personnel action is processed to change or correct the IP, the previous position must be taken into

consideration. Complete the Classification Action field to tell the system what to do with the position the employee is vacating; check with your agency classification specialist for assistance.

☐ The IP is the position the employee actually occupies.

The Incumbent-SSN field in PMSO identifies, by social security number, who occupies the position.

The Obligated-SSN field in PMSO identifies, by social security number, who is either temporarily promoted or detailed from the position.

☐ A split Time and Attendance Report (T&A) may be required if the effective date of the personnel action, which is changing or correcting this field, is other than the first Sunday of the processing pay period. For detailed information on split T&A's, see the T&A procedure.

### Data Entry

*Accession:* Required

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* N/A

*Updating Action:* N/A

**Pay Plan** (*alpha field; 2 positions*). Used to identify the plan prescribed by law or other authoritative source that governs the compensation paid an employee. Each plan provides for a separate wage/pay scale that determines the scheduled rate(s) of pay which the employee is to receive, according to the grade and step.

**Completion Instructions**

Enter one of the following pay plans:

**Code Definition**

<b>AD</b>	Administratively determined rates not elsewhere specified
<b>AE</b>	Determined by the Secretary (No Table)
<b>AL</b>	Administrative Law Judges (P.L. 101-509)
<b>CA</b>	Board of Contract Appeals (P.L. 101-509)
<b>CG</b>	Corporate Graded (FDIC only)
<b>CO</b>	Non-Federal FSA - County Offices
<b>CP</b>	Capitol Police Civilian Pay
<b>DB</b>	Davis Bacon Act
<b>DN</b>	Defense Nuclear Facilities Safety Board Excepted Employees (DNFSB only)
<b>E(Space)</b>	Executive (FDIC)
<b>ED</b>	Expert (5 U.S.C. 3109)
<b>EE</b>	Expert (Other)
<b>EF</b>	Consultant (5 U.S.C. 3109)
<b>EG</b>	Consultant (Other)
<b>EH</b>	Advisory Committee Member (5 U.S.C. 3109)
<b>EI</b>	Advisory Committee Member (Other)
<b>ES</b>	Senior Executive Service (SES)
<b>EX</b>	Executive Pay
<b>FA</b>	Foreign Service Mission Directors, Classes 2, 3, and 4
<b>FC</b>	Foreign Compensation (Agency for International Development under PASA)
<b>FE</b>	Senior Foreign Service (SFS)
<b>FN</b>	Foreign National
<b>FO</b>	Foreign Service Officers
<b>FP</b>	Foreign Service Personnel
<b>FS</b>	Foreign Schedule
<b>GG</b>	Grades similar to General Schedule
<b>GH</b>	GG employees converted to the PRMS
<b>GM</b>	Employees covered by the PMRS termination provisions of P.L. 103-89
<b>GS</b>	General Schedule
<b>GT</b>	Gift and Trust

**Code Definition**

<b>HA</b>	Approved by the Secretary
<b>HG</b>	Local Wage Scale (Hourly)
<b>HL</b>	Local Wage Scale (Hourly)
<b>HS</b>	Local Wage Scale (Hourly)
<b>IC</b>	Consultant (No table)
<b>IE</b>	Institution Executive Schedule
<b>IJ</b>	Immigration Judge Schedule
<b>IL</b>	Institution Senior Level Position
<b>IR</b>	Internal Revenue Service Broadband Classification and Pay System
<b>IS</b>	Institution Schedule
<b>KG</b>	Non-Craft Nonsupervisory (Bureau of Engraving and Printing only)
<b>KL</b>	Non-Craft Leader (Bureau of Engraving and Printing only)
<b>KS</b>	Non-Craft Supervisory (Bureau of Engraving and Printing only)
<b>LE</b>	United States Secret Service Uniformed Division
<b>LP</b>	Capitol Police Law Enforcement Pay
<b>MG</b>	OMHAR Regular Employee
<b>MS</b>	OMHAR Senior Executive
<b>MX</b>	OMHAR Executive
<b>NB</b>	Office of the Comptroller General
<b>NF</b>	Non-Federal
<b>NX</b>	Executive Level/Managerial - NS P.L. 103-82 Subtitle G, Sec.195 (b)
<b>NY</b>	All Other Positions- NS P.L. 103-82 Subtitle G, Sec.195 (b)
<b>OC</b>	Office of the Comptroller of the Currency
<del><b>OE</b></del>	<del>Office of Federal Housing Enterprise Office</del>
<b>PA</b>	Attorneys under GAO's Pay for Performance
<b>PD</b>	Treasury Demonstration Project Positions
<b>PE</b>	Evaluators and related occupations in professional category 2 under GAO's Pay for Performance
<b>PG</b>	Printing & Lithographic (Hourly) (Washington, D.C. only)

**Pay Plan (cont'd)**

**Code Definition**

<b>PL</b>	Printing & Lithographic (Hourly) (Washington, D.C. only)
<b>PS</b>	Printing & Lithographic (Hourly) (Washington, D.C. only)
<b>RA</b>	Approved by the Board of Regents (No table)
<b>RE</b>	General Schedule Positions in the United States Senate Restaurants
<b>RG</b>	Garage Attendants
<b>RS</b>	Senior Biomedical Research Service
<b>RW</b>	U.S. Senate Restaurant Workers
<b>SB</b>	Determined by the Secretary (No table)
<b>SL</b>	Senior Level Positions
<b>SP</b>	Special Pay for Local Police
<b>SR</b>	Statutory Rates
<b>SS</b>	Office of Federal Housing Enterprise Office
<b>ST</b>	Scientific and Professional (5U.S.C. 3104)
<b>TF</b>	Federal Housing Finance Board P.L. 101-73-FIRREA (Grades 01-05)
<b>TM</b>	Federal Housing Finance Board P. L. 101-73-FIRREA(Grades 13-15)
<b>TR</b>	Police Forces of the U.S. Mint and Bureau of Engraving and Printing
<b>TS</b>	Federal Housing Finance Board P.L. 101-73-FIRREA (Grades 01-12)
<b>TW</b>	BEP Police Officers in Washington, D.C. (Bureau of Engraving and Printing only)
<b>VE</b>	Reserved for Farm Credit Administration (FCA)
<b>VG</b>	FCA equivalent to Pay Plan GG but at a higher rate scale
<b>VH</b>	FCA equivalent to Pay Plan GH but at a higher rate scale
<b>WB</b>	Wage positions under the Federal Wage System not otherwise designated

**Code Definition**

<b>WD</b>	Production facilitating nonsupervisory- Federal Wage System
<b>WE</b>	Craft (Bureau of Engraving and Printing only)
<b>WG</b>	Nonsupervisory pay schedules - Federal Wage System
<b>WI</b>	Wage Board - Printing and lithographic pay schedules (Washington, D.C. Metropolitan Area only)
<b>WL</b>	Leader pay schedules - Federal Wage System
<b>WM</b>	Wage Board - Maritime pay schedules
<b>WN</b>	Wage Board - Production facilitating - supervisory
<b>WS</b>	Wage Board - Supervisory pay schedules
<b>WT</b>	Wage Apprentices and Shop Trainees
<b>XD</b>	Printing Schedule - Nonsupervisory production facilitating jobs <sup>1/</sup>
<b>XL</b>	Printing Schedule - Leader jobs <sup>1/</sup>
<b>XN</b>	Printing Schedule - Supervisory production facilitating jobs <sup>1/</sup>
<b>XP</b>	Printing Schedule - Nonsupervisory jobs <sup>1/</sup>
<b>XS</b>	Printing Schedule - Supervisory jobs <sup>1/</sup>
<b>ZA</b>	Administrative Career Path <sup>2/</sup> (NIST Personnel Management Demonstration Project)
<b>ZP</b>	National Zoological Park Police (Smithsonian Institution)
<b>ZP</b>	Scientific and Engineering Career Path <sup>2/</sup> (NIST Personnel Management Demonstration Project)
<b>ZS</b>	Administrative Support Career Path <sup>2/</sup> (NIST Personnel Management Demonstration Project)
<b>ZT</b>	Scientific and Engineering Technician Career Path <sup>2/</sup> (NIST Personnel Management Demonstration Project)
<b>ZZ</b>	Use Only With Pay Basis Without Compensation

<sup>1/</sup> These special printing schedules are applicable to printing and lithographic employees in the 4400 Family and the 5330 series in the following designated wage areas:

Washington, D.C.

St. Louis, Missouri

Kansas City, Missouri

Philadelphia, Pennsylvania

Employees in the 4400 Family and the 5330 series in areas other than those above are paid under the regular wage schedules for their wage areas under GS, WL, or WS pay plans. (There are only three steps in the X pay schedules as compared to five steps in the regular wage schedules.)

<sup>2/</sup> These codes take the place of GS and GM for the Department of Commerce, National Institute of Standards and Technology (NIST), NIST Personnel Management Demonstration Project only.

### Pay Plan (cont'd)

- ❑ Enter the two-character pay plan code for all accession personnel actions.
- ❑ For personnel actions other than accessions, enter the pay plan only if the combination of pay plan/grade/step/salary is changing.
- ❑ To view valid pay plans, see TMGT, Table 025, AD-350 (Personnel Block And Description).

### Additional Information

- ❑ The pay plan on the processing personnel action must agree with the pay plan in PMSO.
- ❑ PACT performs front end edits on the pay plan recorded on the processing personnel action. PINE uses the pay plan from PMSO to perform edits if the pay plan is omitted from the processing personnel action.
- ❑ To correct or change the pay plan, the pay plan in the PMSO Master Record must be changed before the official change action is processed.
- ❑ When processing certain types of official change actions, e.g., a quality increase, the grade may be

entered without other PMSO key data elements present. If the grade is entered, data must also be entered for the pay plan, step, and salary.

- ❑ A split Time and Attendance Report (T&A) may be required if the effective date of the personnel action, which is changing or correcting this field, is other than the first Sunday of the processing pay period. For detailed information on split T&A's, see the T&A procedure.

- ❑ When the nature of action code on the processing personnel action indicates termination of grade retention, the pay plan on the processing action must be the same as the pay plan on the employee's retained grade data record (IRIS Program IR128).

### Data Entry

*Accession:* Required

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* N/A

*Updating Action:* N/A

---

**Step** (*numeric field; 2 positions*). Used to indicate a specific salary within a grade, level, class, rank, or pay band.

---

#### Completion Instructions

- Enter the two-digit step, preceding single digits with a zero.
- If the step is entered, then the pay plan and salary must also be entered.
- If the employee is in the Senior Executive Service (Pay Plan ES), enter the appropriate SES pay rate code (01-06).

#### Additional Information

- When processing certain types of official change actions, e.g., a quality increase, the grade may be entered without other PMSO key data elements present. If the grade is entered, data must also be entered for the pay plan, step, and salary.
- A split Time and Attendance Report (T&A) may be required if the effective date of the personnel action,

which is changing or correcting this field, is other than the first Sunday of the processing pay period. For detailed information on split T&A's, see the T&A procedure.

- When the processing personnel action denotes entitlement to grade or pay retention, the step must be **00**.

#### Data Entry

*Accession:* Required

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* N/A

*Updating Action:* N/A

---

**Base Salary** (*numeric field; max. of 8 positions*). Used to identify the base (scheduled) amount of salary the employee is receiving for the position held and which is fixed by law, regulation, or administrative action.

---

### Completion Instructions

- For General Schedule employees, enter the per annum amount regardless of the employee's work schedule.
- Enter the base (scheduled salary) amount that the employee will be receiving.

**Note:** The scheduled salary amount should not include locality-based comparability payments or interim geographic adjustments (IGA's).

Locality-based comparability payments are computed automatically based on the pay plan and official duty stations for areas authorized to receive locality payments. The amount of locality pay is recorded on the database salary data record (IRIS Program 101) in the Geographic-Adj-Rate field. The total amount of the scheduled salary and locality pay is recorded in the Adjusted-Salary field on IRIS Program 101.

The IGA is computed automatically by the Payroll/Personnel System, based on the occupational series code and duty station. The IGA is recorded on the database salary data record (IRIS Program 101) in the Geographic-Adj-Rate field. The total amount of the scheduled salary and IGA is recorded in the Adjusted-Salary field on IRIS Program 101.

- For detailed information on viewing salary rates, see TMGT, Table 029, Pay Table Rates.
  - For detailed information on viewing occupational special pay areas for employees entitled to a special rate of pay based on selected occupational series and duty station locations, see TMGT, Table 031, Spec Pay Converters W/Occup-Series & Duty Stations.
  - For detailed information on viewing Wage Board Area Codes for Federal Wage System employees, see TMGT, Table 033, Spec Pay Converters For Wage Board Emp.
- For personnel actions other than accessions, enter the base (scheduled) salary only if changing or correcting the combination of pay plan/grade/step and salary.

- The base (scheduled) salary amount must not include any premium pay and allowances or differentials to which the employee may be entitled to.
- If the pay plan recorded in PMSO is a Federal Wage System (WG) pay plan:
  - the base (scheduled) salary amount must be the first shift rate for the employee's position and grade regardless of whether or not the employee will actually be working this shift.
  - the base (scheduled) salary amount must be a per hour amount and the salary rate code must be **PH**.
- If the employee is a cooperative employee or reemployed annuitant, enter the total scheduled salary amount (do not subtract the cooperative or annuity share from the total base (scheduled salary) amount).
- If the employee is a cooperative employee, the Coop Share Amt field must also be completed and must be the same amount entered in the base (scheduled) salary field. For additional information on cooperative employees, see the [Coop Share Amt](#) data element.
- If the employee is a reemployed annuitant, the Annuitant Share Amt field must also be completed and must be the total annual annuity amount. When the employee's pay is computed, the Annuitant Share Amt will be deducted from the base (scheduled) salary amount, and the employee will receive the difference.
- If the employee will be serving without compensation, key in **eight zeroes**.

### Additional Information

- When processing certain types of official change actions, e.g., a quality increase, the grade may be entered without other PMSO key data elements present. If the grade is entered, data must also be entered for the pay plan, step, and salary.
- A split Time and Attendance Report (T&A) may be required if the effective date of the personnel action, which is changing or correcting this field, is other than the first Sunday of the processing pay period. For detailed information on split T&A's, see the T&A procedure.

**Base Salary** (*cont'd*)

- The base (scheduled) salary amount for certain pay plans (e.g., AD, SR, etc.) cannot be verified in TMGT and must be verified (reentered) in the Verify Salary field.
- When the processing personnel action denotes entitlement to grade retention, the Base Salary field must be blank.

**Data Entry**

*Accession:* Required

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to the combination of pay plan/grade/step and salary.

*Separation:* N/A

*Updating Action:* N/A

---

**Verify Salary** (*numeric field; max. of 8 positions*). Used to verify the base (scheduled) salary amount when the salary cannot be verified in TMGT. The base (scheduled) salary amount for certain pay plans, e.g., AD, SR, etc., cannot be verified in TMGT and must be reentered in the Verify Salary field.

---

**Data Entry**

*Accession:* Required if the base (scheduled) salary amount cannot be verified in TMGT.

*Official Change:* Required if the base (scheduled) salary

amount cannot be verified in TMGT.

*Separation:* N/A

*Updating Action:* N/A

---

**Salary Rate Code** (*alpha field; 2 positions*). Used to identify the pay basis for the salary the employee is receiving for the position being held, which is fixed by law, regulation, or administrative action.

---

### Completion Instructions

- Enter one of the following salary rate codes:

Code	Definition
------	------------

<i>PA</i>	Per Annum
-----------	-----------

<i>PD</i>	Per Day
-----------	---------

<i>PH</i>	Per Hour
-----------	----------

<i>PM</i>	Per Month
-----------	-----------

<i>PW</i>	Piece Work
-----------	------------

<i>FB</i>	Fee Basis
-----------	-----------

<i>WC</i>	Without Compensation
-----------	----------------------

<i>BW</i>	Biweekly
-----------	----------

### Additional Information

- The base (scheduled) salary and salary rate code must be compatible, i.e., if the base (scheduled) salary was entered as a per annum amount, then the Salary Rate Code field must be PA (per annum).
- If the employee's pay plan is GS, the Salary Rate Code field must be PA (per annum) regardless of the employee's work schedule.

- If the employee's pay plan is a Wage System pay plan, the Salary Rate Code field must be PH.

- If the employee is serving without compensation, the Salary Rate Code field must be WC.

- When the processing personnel action denotes entitlement to grade retention, the Salary Rate Code field must be blank.

- A split Time and Attendance Report (T&A) may be required if the effective date of the personnel action, which is changing or correcting this field, is other than the first Sunday of the processing pay period. For detailed information on split T&A's, see the T&A procedure.

### Data Entry

*Accession:* Required

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to the combination of pay plan/grade/step and salary.

*Separation:* N/A

*Updating Action:* N/A

---

**Veterans Preference** (*numeric field; 1 position*). Used to indicate the employee's category of entitlement to preference in the Federal service based on military service that terminated honorably.

---

### Completion Instructions

Enter one of the following codes that represent the employee's highest type of veteran service that has been verified:

Code	Definition
1	None
2	5-point
3	10-point disability
4	10-point compensable
5	10-point other
6	10-point/30 percent compensable
7	Dishonorable discharge

**Note:** Code 7 is not an OPM defined value and is reported to the employee's CPDF as Code 1.

### Additional Information

If the veterans preference cannot be determined at the time of the accession, enter code **1**. Process a correction action when the veterans preference is verified.

### Data Entry

*Accession:* Required

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* N/A

*Updating Action:* N/A

---

**Tenure Group** (*numeric field; 1 position*). Used to identify the retention group (for reduction in force purposes) in which the employee is placed, based on the type of appointment.

---

### Completion Instructions

Enter one of the following codes that indicate the retention group in which the employee is being placed:

Code	Definition
------	------------

0	Not in a retention group
1	Group I
2	Group II
3	Group III

### Additional Information

- If the Tenure Group field is 0, the Type of Appointment field must be 04 or 09, and the Probationary Period Start Date and Career Tenure Date fields must be blank.
- If the Tenure Group field is 1, the Type of Appointment field must be 01 or 06, and the Probationary Period Start Date and Career Tenure Date fields must be blank.
- If the Tenure Group field is 2, the Type of Appointment field must be 01, 02, 06, or 07.

- If the Type of Appointment field is 01 or 06, the Career Tenure Date field must be blank.
- If the Type of Appointment field is 02 or 07, the Career Tenure Date field must be completed, and the Probationary Period Start Date field is optional.
- If the Tenure Group field is 3, the Type of Appointment field must be 03, 08, or 09.
- If the Type of Appointment field is 08, the Probationary Period Start Date and Career Tenure Date fields must be blank.

### Data Entry

*Accession:* Required

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* N/A

*Updating Action:* N/A

---

**Veterans Preference RIF** (*numeric field; 1 position*). Used to identify if an employee is entitled to veterans preference for reduction in force (RIF) purposes.

---

**Completion Instructions**

Enter one of the following codes that indicates the appropriate veterans preference RIF:

**Code Definition**

- 1** 30% disabled or more
- 2** Veteran
- 3** Nonveteran (no retention rights)
- 4** Ineligible
- 5** Nonveteran (retention rights)

**Additional Information**

- If **1** is entered in this field, the Veterans Preference field must be **6**.
- If **2** is entered in this field, the Veterans Preference field must be **2-5**.

If **3** is entered in this field, the Veterans Preference field must be **1** or **7**.

If **4** is entered in this field, the Veterans Preference field *cannot* be **1**, **5**, or **7**.

If **5** is entered in this field, the Veterans Preference field must be **1**.

*Accession:* Required

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* N/A

*Updating Action:* N/A

---

**FEGLI Coverage** (*alphanumeric field; 2 positions*). Used to identify if the employee is eligible for participation in the Federal Employees' Group Life Insurance Program (FEGLI). If eligible, the code indicates whether: the employee waived coverage, is covered by basic life only, or has elected coverage under one of the optional insurance plans as well as the basic life.

---

**Completion Instructions**

☐ Enter one of the codes from the SF-2817, Life Insurance Election, which is completed by the employee at the time of hire, or with data from a previously completed SF-2817 which is on file and still in effect:

**Code Definition**

<b>A0</b>	Ineligible for life insurance coverage	<b>I5</b>	Basic plus Additional with 1 times pay and 5 times Family Option
<b>B0</b>	Waived all life insurance	<b>J1</b>	Basic plus Additional with 1 times pay, Standard Option, and 1 times Family Option
<b>C0</b>	Basic only	<b>J2</b>	Basic plus Additional with 1 times pay, Standard Option, and 2 times Family Option
<b>D0</b>	Basic plus Standard Option	<b>J3</b>	Basic plus Additional with 1 times pay, Standard Option, and 3 times Family Option
<b>E1</b>	Basic with 1 times Family Option	<b>J4</b>	Basic plus Additional with 1 times pay, Standard Option, and 4 times Family Option
<b>E2</b>	Basic with 2 times Family Option	<b>J5</b>	Basic plus Additional with 1 times pay, Standard Option, and 5 times Family Option
<b>E3</b>	Basic with 3 times Family Option	<b>K0</b>	Basic plus Additional with 2 times pay
<b>E4</b>	Basic with 4 times Family Option	<b>L0</b>	Basic plus Additional with 2 times pay and Standard Option
<b>E5</b>	Basic with 5 times Family Option	<b>M1</b>	Basic plus Additional with 2 times pay and 1 times Family Option
<b>F1</b>	Basic plus Standard with 1 times Family Option	<b>M2</b>	Basic plus Additional with 2 times pay and 2 times Family Option
<b>F2</b>	Basic plus Standard with 2 times Family Option	<b>M3</b>	Basic plus Additional with 2 times pay and 3 times Family Option
<b>F3</b>	Basic plus Standard with 3 times Family Option	<b>M4</b>	Basic plus Additional with 2 times pay and 4 times Family Option
<b>F4</b>	Basic plus Standard with 4 times Family Option	<b>M5</b>	Basic plus Additional with 2 times pay and 5 times Family Option
<b>F5</b>	Basic plus Standard with 5 times Family Option	<b>N1</b>	Basic plus Additional with 2 times pay, Standard Option, and 1 times Family Option
<b>G0</b>	Basic plus Additional with 1 times pay	<b>N2</b>	Basic plus Additional with 2 times pay, Standard Option, and 2 times Family Option
<b>H0</b>	Basic plus Additional with 1 times pay and Standard Option	<b>N3</b>	Basic plus Additional with 2 times pay, Standard Option, and 3 times Family Option
<b>I1</b>	Basic plus Additional with 1 times pay and 1 times Family Option	<b>N4</b>	Basic plus Additional with 2 times pay, Standard Option, and 4 times Family Option
<b>I2</b>	Basic plus Additional with 1 times pay and 2 times Family Option	<b>N5</b>	Basic plus Additional with 2 times pay, Standard Option, and 5 times Family Option
<b>I3</b>	Basic plus Additional with 1 times pay and 3 times Family Option	<b>90</b>	Basic plus Additional with 3 times pay
<b>I4</b>	Basic plus Additional with 1 times pay and 4 times Family Option	<b>P0</b>	Basic plus Additional with 3 times pay and Standard Option

**Code Definition**

<b>Q1</b>	Basic plus Additional with 3 times pay and 1 times Family Option	<b>Y1</b>	Basic plus Additional with 5 times pay and 1 times Family Option
<b>Q2</b>	Basic plus Additional with 3 times pay and 2 times Family Option	<b>Y2</b>	Basic plus Additional with 5 times pay and 2 times Family Option
<b>Q3</b>	Basic plus Additional with 3 times pay and 3 times Family Option	<b>Y3</b>	Basic plus Additional with 5 times pay and 3 times Family Option
<b>Q4</b>	Basic plus Additional with 3 times pay and 4 times Family Option	<b>Y4</b>	Basic plus Additional with 5 times pay and 4 times Family Option
<b>Q5</b>	Basic plus Additional with 3 times pay and 5 times Family Option	<b>Y5</b>	Basic plus Additional with 5 times pay and 5 times Family Option
<b>R1</b>	Basic plus Additional with 3 times pay, Standard Option, and 1 times Family Option	<b>Z1</b>	Basic plus Additional with 5 times pay, Standard Option, and 1 times Family Option
<b>R2</b>	Basic plus Additional with 3 times pay, Standard Option, and 2 times Family Option	<b>Z2</b>	Basic plus Additional with 5 times pay, Standard Option, and 2 times Family Option
<b>R3</b>	Basic plus Additional with 3 times pay, Standard Option, and 3 times Family Option	<b>Z3</b>	Basic plus Additional with 5 times pay, Standard Option, and 3 times Family Option
<b>R4</b>	Basic plus Additional with 3 times pay, Standard Option, and 4 times Family Option	<b>Z4</b>	Basic plus Additional with 5 times pay, Standard Option, and 4 times Family Option
<b>R5</b>	Basic plus Additional with 3 times pay, Standard Option, and 5 times Family Option	<b>Z5</b>	Basic plus Additional with 5 times pay, Standard Option, and 5 times Family Option
<b>S0</b>	Basic plus Additional with 4 times pay		
<b>T0</b>	Basic plus Additional with 4 times pay and Standard Option		
<b>U1</b>	Basic plus Additional with 4 times pay and 1 times Family Option		
<b>U2</b>	Basic plus Additional with 4 times pay and 2 times Family Option		
<b>U3</b>	Basic plus Additional with 4 times pay and 3 times Family Option		
<b>U4</b>	Basic plus Additional with 4 times pay and 4 times Family Option		
<b>U5</b>	Basic plus Additional with 4 times pay and 5 times Family Option		
<b>V1</b>	Basic plus Additional with 4 times pay, Standard Option, and 1 times Family Option		
<b>V2</b>	Basic plus Additional with 4 times pay, Standard Option, and 2 times Family Option		
<b>V3</b>	Basic plus Additional with 4 times pay, Standard Option, and 3 times Family Option		
<b>V4</b>	Basic plus Additional with 4 times pay, Standard Option, and 4 times Family Option		
<b>V5</b>	Basic plus Additional with 4 times pay, Standard Option, and 5 times Family Option		
<b>W0</b>	Basic plus Additional with 5 times pay		
<b>X0</b>	Basic plus Additional with 5 times pay and Standard Option		

**Additional Information**

- Enrollment in FEGLI is automatic unless:
  - the employee is appointed to a position or is under a type of appointment or employment which is excluded from coverage by law or regulation
  - the employee voluntarily waives coverage by completing an SF-2817.
  - the employee previously waived coverage under a prior Federal appointment, and such waiver is still in effect. **Note:** A previous waiver of coverage is automatically canceled if the employee is reinstated following a break in service of at least 180 days.
- Enter Code **A0** only if the employee (including reemployed annuitants) is excluded from coverage by law or regulation (no deductions for life insurance will be made).
- Enter Code **B0** only if the employee (including reemployed annuitants) elects to waive all insurance coverage or has previously waived all insurance coverage during prior employment and the waiver is still in effect.
- Enter Code **C0** when the employee (including reemployed annuitants) is not excluded from coverage by law or regulation, has not waived coverage, and has elected not to be covered by any of the optional insurance coverage plans.

**FEGLI Coverage** (*cont'd*)

**Note:** If the employee has not submitted the SF-2817 to the agency when the accession action is ready for processing, enter Code **C0** on the accession personnel action, because the employee must be considered as being covered by basic life insurance. Process a personnel action when the SF-2817 is received in the personnel office and the employee has either waived coverage or has indicated that he/she wants the optional insurance coverage as well as the regular coverage.

Enter the appropriate Code **90** or **D1** through **Z5** (except **00**) if:

- the employee is not excluded from coverage by law or regulation
- has not waived coverage and
- has elected to be covered by one of the optional insurance plans in addition to the basic coverage

An employee who has an alternating tour of duty and is in an intermittent status at the time of hire is not eligible for FEGLI coverage.

Enter Code **A0** if the employee is eligible for non-Federal life insurance, and enter the appropriate plan code in PRES Document Type 102, Non-Federal Life

Insurance Form. For detailed information, see Insurance in the PRES procedure.

If both FEGLI and non-Federal life insurance are elected, enter the appropriate code in this field and enter the non-Federal life insurance plan code through PRES Document Type 102.

When an employee has a birthday that moves him/her to another age band, the premiums for the new age band will be effective the pay period following the pay period in which the birthday occurs. The Payroll/Personnel System will generate a personnel action with NOAC 903/Z00, Change in FEGLI Age Bracket, when an employee changes to a new age band. The change to the new age band will also be shown on the employee's AD-334, Statement of Earnings and Leave, the pay period the change occurs.

**Data Entry**

*Accession:* Required

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* N/A

*Updating Action:* N/A

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**Adj Salary** (*numeric field; 8 positions*). Used to record the amount of the employee's scheduled (base) salary **plus** any geographic adjusted rate (e.g., IGA, LEO, or locality pay) the employee is eligible to receive.

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#### Completion Instructions

Enter the annual amount of the employee's adjusted salary. The first 6 digits are whole dollars and the last 2 digits are cents.

#### Additional Information

This field must be completed when a personnel action is processed to change the salary for an employee whose pay rate determinant code is M (Continued IGA/LEO Pay). **Note:** When a personnel action is processed to change the salary for an employee whose pay rate deter-

minant code is M, the pay rate determinant code M **must also be present** on the processing personnel action.

#### Data Entry

*Accession:* Required if the pay rate determinant code is M.

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* N/A

*Updating Action:* N/A

---

**Annuitant Indicator** (*alphanumeric field; 1 position*). Used to identify whether the employee is receiving retired or retainer pay from previous civilian or military service.

---

**Completion Instructions**

☐ Enter one of the following codes:

**Code Definition**

**A** Reemployed FERS annuitant. An employee whose annuity under the Federal Employees Retirement System (FERS) continues after appointment and is subject to salary offset.

**B** Former FERS annuitant. An employee whose FERS annuity is discontinued after appointment.

**C** Retired uniformed service officer and reemployed FERS annuitant. The employee is a retired uniformed service commissioned or warrant officer and a reemployed FERS annuitant who is subject to salary offset.

**D** Retired uniformed service officer and former FERS annuitant. The employee is a retired uniformed service commissioned or warrant officer and a reemployed FERS annuitant whose FERS annuity is discontinued after appointment.

**E** Retired uniformed service enlisted member and reemployed FERS annuitant. The employee is a retired uniformed enlisted member and a reemployed FERS annuitant who is subject to salary offset.

**F** Retired uniformed service enlisted member and former FERS annuitant. The employee is a retired uniformed service enlisted member and a reemployed FERS annuitant whose FERS annuity is discontinued after appointment.

**G** Reemployed FERS annuitant. An employee whose FERS annuity continues after appointment and whose salary is not subject to salary reduction under 5 U.S.C. 8468.

**H** Retired uniformed service officer and reemployed FERS annuitant. The employee is a

retired uniformed service commissioned or warrant officer and a reemployed FERS annuitant whose salary is not subject to salary reduction under 5 U.S.C. 8468.

**J** Retired uniformed service enlisted member and reemployed FERS annuitant. The employee is a retired uniformed service enlisted member and a reemployed FERS annuitant whose salary is not subject to reduction under 5 U.S.C. 8468.

**I** Reemployed CSRS annuitant. An employee whose annuity under the Civil Service Retirement System (CSRS) continues after appointment.

**2** Retired uniformed service officer. The employee is a member or former member of a uniformed service who is receiving retired or retainer pay as a commissioned or warrant officer.

**3** Retired uniformed service enlisted member. The employee is a member or former member of a uniformed service who is receiving retired or retainer pay for nonofficer (or enlisted) service.

**4** Retired uniformed service officer and reemployed CSRS annuitant. The employee is a retired uniformed service commissioned or warrant officer and a reemployed annuitant.

**5** Retired uniformed service enlisted member and reemployed CSRS annuitant. The employee is a retired uniformed service enlisted member and a reemployed CSRS annuitant.

**6** Reemployed CSRS annuitant. An employee whose annuity under the Civil Service Retirement System (CSRS) continues after appointment and whose salary is not subject to reduction under 5 U.S.C. 8344.

**Annuitant Indicator** (*cont'd*)

- 7 Retired uniformed service officer and reemployed CSRS annuitant. The employee is a retired uniformed service commissioned or warrant officer and a reemployed CSRS annuitant whose salary is not subject to reduction under 5 U.S.C. 8344.
- 8 Retired uniformed service enlisted member and reemployed CSRS annuitant. The employee is a retired uniformed service enlisted member and a reemployed CSRS annuitant whose salary is not subject to reduction under 5 U.S.C. 8344.
- 9 Not applicable. None of the above codes apply.

**Additional Information**

- The CSR Share field must also be completed if the annuitant indicator is **I, 4, 5, A, C, E, G, H, or J.**

**Data Entry**

*Accession:* Required

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* N/A

*Updating Action:* N/A

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**Pay Rate Determinant Code** (*alphanumeric field; 1 position*). Used to identify whether the employee is receiving a rate of pay other than the regular rate for the position, and, if so, to identify the legal and/or regulatory basis.

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### Completion Instructions

Enter one of the following codes:

Code	Definition
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0	This code is used for employees, regardless of pay system, who receive a scheduled rate and for whom none of the following codes apply.
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2	Saved Rate - Indefinite. Employee is paid, without time limitation, at a pay rate above the maximum rate for the grade when: (a) on or before June 30, 1984, the Foreign Service domestic employee was converted to the General Schedule in accordance with P.L. 96-465; or (b)(1) prior to January 11, 1979 (the effective date of section 801(a) of the Civil Service Reform Act (CSRA) P.L. 95-454,92 Stat.1111), the employee and his or her position had been converted from one pay plan to another under appropriate authority; and (2) the employee is not entitled to either grade or pay retention (Codes A, B, J, K, U, or V below) on the effective date of the CSRA.
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3	Retained pay - Special Rate Adjustment. Employee is receiving retained pay due to: (1) a downward adjustment of a special rate range that left the employee with a pay rate higher than the highest pay rate in the new special rate range; or (2) abolishment of a special rate range that left the employee with a pay rate in excess of the top rate of grade.
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4	Saved Rate - Other. Employee is receiving saved rate pay at a rate above the regular rate and no other code is applicable. (This code is not applicable for saved rates under the Federal Wage System and is not applicable for saved rates under the General Schedule except when authorized by 5 CFR 531.205(a)(3), e.g., for employees promoted from special rate positions to non-special rate positions.)
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5	Special and Superior Qualifications Rates. For use when PRD codes 6 and 7 below are both applicable. <b>Note:</b> Code 5 is used only on the action that appointed the employee at a superior qualifications rate within a special rate range; Code 6 is used on subsequent actions while the
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employee continues to receive a special rate of pay.

6	Special Rate. Employee is paid at a special rate, established under appropriate authority to recruit well qualified individuals in selected occupations and locations. (If the employee is also entitled to a retained grade, use Code E or F, as appropriate.)
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7	Superior Qualifications Rate. Employee is hired at a pay rate above the minimum rate of the grade. <b>Note:</b> Code 7 is used only on the action that appoints the employee at a superior qualifications rate; Code 0 or other appropriate code is used on actions subsequent to the appointment action.
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A	Retained Grade - Different Position. Employee retains grade for a 2-year period, but is occupying a different position than that held before the grade reduction. (If employee is also entitled to a special rate in the retained grade, use Code E.)
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B	Retained Grade - Same Position. Employee retains grade for a 2-year period and continues to occupy the same position held before the grade reduction. (If employee is also entitled to a special rate in the retained grade, use Code F.)
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C	Critical Position Pay. Employee is receiving pay greater than would otherwise be payable for the employee's position because the position has been designated critical by the Office of Management and Budget (OMB) in consultation with the Office of Personnel Management (OPM).
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E	Retained Grade and Special Rate - Different Position. Employee retains grade for a 2-year period, is entitled to a special rate in the retained grade, but is occupying a different position than that held before the grade reduction.
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F	Retained Grade and Special Rate - Same Position. Employee retains grade for a 2-year period, is entitled to a special rate in the retained grade, but is occupying the same position held before the grade reduction.
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**Pay Rate Determinant Code** (*cont'd*)

- J** Retained Pay - Same Position. Employee is receiving a retained rate of pay under 5 U.S.C. 5363(a)(1) or (3), or 5 CFR 536.104 (except section 536.104(a)(3), and continues to occupy the same position held before the reduction in grade or other action that otherwise would have resulted in a reduction in basic pay. (**Note:** The employee's pay rate may have been reduced to 150 percent of the maximum rate of basic pay payable for the present grade of the position.)
- K** Retained Pay - Different Position. Employee is receiving a retained rate of pay under 5 U.S.C. 5363(a)(1) or (3), or 5 CFR 536.104 (except section 536.104(a)(3), but is currently occupying a different position than that held before the reduction in grade or other action that otherwise would have resulted in a reduction in basic pay. **Note:** The employee's pay rate may have been reduced to 150 percent of the maximum rate of basic pay payable for the grade of the position now occupied.
- M** Continued IGA/LEO Pay. Employee continues to receive an adjusted annual rate of pay based on a nationwide or worldwide special salary rate. The employee should be paid the dollar amount of the General Schedule increase or the dollar amount of the increase in the special rate, whichever is less, at the time of an ECI adjustment. Reference: 5 CFR 531.703 or 5 CFR 531.307.
- R** Retained Pay - SES Removal. A former career Senior Executive Service (SES) employee is receiving a retained rate of pay under 5 U.S.C. 3594 and 5 CFR 359.705 following removal from the SES.
- S** Continued SES Basic Pay. A career Senior Executive Service (SES) employee appointed to a position outside of the SES for which the rate of basic pay is equal to or greater than the rate payable for Level V of the Executive Schedule and the employee elected to continue to receive basic pay as if remaining in the SES in accordance with 5 U.S.C 3392(c) and 5 CFR Part 317, Subpart H.

- T** Below the Minimum Rate. Employee is paid, without time limitation, at a pay rate below the minimum rate for the grade or pay band.
- U** Retained Grade and Pay - Same Position. The employee: (1) has a retained grade; (2) is receiving retained pay; and (3) continues to occupy the same position held immediately before the action that otherwise would have resulted in a reduction in basic pay; i.e., use this code only when Code *J* would be appropriate if grade retention were not also applicable.
- V** Retained Grade and Pay - Different Position. The employee: (1) has a retained grade, (2) is receiving pay retention, and (3) is currently occupying a different position than that held immediately before the action that otherwise would have resulted in a reduction in basic pay; i.e., use this code only when Code *K* would be appropriate if grade retention were not also applicable.

**Additional Information**

- A split Time and Attendance Report (T&A) may be required if the effective date of the personnel action, which is changing or correcting this field, is other than the first Sunday of the processing pay period. For detailed information on split T&A's, see the T&A procedure.
- When the processing personnel action denotes entitlement to grade retention or grade and pay retention, the pay rate determinant code must be **A**, **B**, **E**, **F**, **U**, or **V**.
- When the processing personnel action denotes entitlement to pay retention, the pay rate determinant code must be **3**, **J**, or **K**.

**Data Entry**

*Accession:* Required

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* N/A

*Updating Action:* N/A

**Retirement Coverage** (*alphanumeric field; 1 position*). Used to identify the civilian retirement system(s), to which deductions from an employee's pay are credited, based on civilian employment by the U.S. Government or the District of Columbia.

**Completion Instructions**

Single System Deductions

Enter one of the following retirement coverage codes if the total amount of retirement deductions withheld from the employee's pay will be credited to a single retirement system:

Code	Definition
1	Civil Service Retirement System (CSRS)
2	Social Security System (FICA)
3	Foreign Service Retirement and Disability System (FS)
4	None
5	Other Retirement System
6	Civil Service Retirement System-Special (CSRS-Special). For law enforcement officers and firefighters.
7	CSRS (Congressional)
Y	DC Retirement - Offset
Z	DC Retirement Plan

Combination of FICA and Partial Deductions

Enter one of the following retirement coverage codes if full deductions will be withheld for FICA, and partial deductions will be withheld and credited to another system:

Code	Definition
8	CVA Judges Retirement Plan (!%). Covered by FICA and the Court of Veterans Appeals (CVA) Retirement Plan.
9	CVA Judges Retirement Plan (4.5%). Covered by FICA and the Court of Veterans Appeals (CVA) Retirement Plan.
C	FICA and CSRS. Covered by FICA and by the Civil Service Retirement System.
D	CSRS Offset (Congressional) (FICA)
E	FICA and CSRS. Covered by FICA and by the Civil Service Retirement System. For law enforcement and firefighter personnel.

G	FICA and FS. Covered by FICA and by the Foreign Service Retirement and Disability System.
I	Federal Employees Retirement System (FERS) (Congressional) (FICA)
J	FICA and other retirement system. Covered by FICA and by another Federal Government Retirement System.
K	FERS and FICA. Covered by the Federal Employee's Retirement System and FICA.
L	FERS and FICA - Air Traffic Controllers
M	FERS and FICA - Special
N	FERS and FICA - Reserve Technicians
P	Foreign Service Pension Systems (FSPS) and FICA.

Combination of FICA and Full Deductions

Enter one of the following retirement coverage codes if full deductions will be withheld for FICA, and full deductions will be withheld and credited to another system:

Code	Definition
R	FICA and CSRS. Covered by FICA and the Civil Service Retirement System.
T	FICA and CSRS - Special. For law enforcement and firefighter personnel.
W	FICA and FS
X	FICA and Other Retirement System

**Additional Information**

- Enter Code 4 (none) when the employee is not eligible for coverage under any retirement system.
- Enter Code 5 only when the employee is to be covered by a retirement coverage other than CSRS, FERS, FICA, or Foreign Service.
- Enter Code 8 or 9 only for CVA judges who are eligible to convert, or have converted to, the CVA Judges Retirement Plan.
- Enter Code Z only for CSRS employees who are eligible to convert, or have converted to, the DC Retirement Plan.

**Retirement Coverage** (*cont'd*)

□ Enter Code 2 if the employee is eligible for non-Federal retirement coverage, and enter the appropriate plan code in PRES Document Type 103, Non-Federal Retirement Benefits Form. For detailed information, see Insurance in the PRES procedure.

□ Whenever Code 6, E, M, or T is entered in this field, a Multielement Update Document (Document Type 120) must be processed to establish the 6C Retirement Date in the Payroll/Personnel database. If a Document Type 120 is not processed, the processing personnel action will remain in the Suspense Inquiry and Correction System (SINQ) until a Document Type 120 has been processed to establish the 6C Retirement Date.

□ A split Time and Attendance Report (T&A) may be required if the effective date of the personnel action, which is changing or correcting this field, is other than the first Sunday of the processing pay period. For detailed information on split T&A's, see the T&A procedure.

**Data Entry**

*Accession:* Required

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* N/A

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**SCD Leave** (*numeric field; 6 positions*). Used to identify the date from which service for annual leave earning and/or length of service purposes is computed.

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### Completion Instructions

- Enter the SCD Leave as 6 numeric characters in month, day, and year order (e.g., **060994**). Do not enter any punctuation.
- This date cannot be later than the effective date of the processing personnel action.
- This field must be completed for all employees, regardless of the type of work schedule. However, if the Special Employee Code is **45**, Forest Service YCC Enrollee, or **46**, Senior Community Service Program Enrollee, this field must be zeros.
- When the employee is eligible to earn annual leave, the annual leave category must be compatible with the date entered in this field.
- If previous service is unknown, enter the effective date of the accession personnel action.
- If this field is left blank, the effective date of the processing personnel action will be generated for this field if the nature of action code is:
  - 100 - Career Appt
  - 101 - Career Cond Appt
  - 140 - Reins - Career Appt
  - 141 - Reins - Career Cond Appt
  - 170 - Excepted Appt

### Completion Instructions

- This date is used by the Payroll/Personnel System to generate various external reports such as:
  - The projected number of annual leave hours an employee has in excess of the maximum carryover (usually 240 hours) to either use, lose, or have restored by the end of the leave year.
  - Notification when the employee's leave category changes.
  - Annual length of service report.
- The Payroll/Personnel System automatically adjusts this date at the end of the leave year for:
  - all excess nonpay status (exclusive of military furlough or compensable injury leave) which

occurred during the calendar year provided the employee is on the rolls of the Department at that time. An SF-50-B, Notification of Personnel Action, is produced with Remarks Code B32, Changes SCD from (date) to reflect excess time in nonpay status during calendar year XX.

- all intermittent employees to record the days worked under the intermittent appointment during the calendar year. An SF-50-B is produced with Remarks Code B31, Changes SCD from (date) to reflect number of days worked under intermittent appointments.
  - The Payroll/Personnel System automatically adjusts this date for:
    - days of creditable intermittent service whenever an action is processed which changes an employee from intermittent to full-time or part-time. An SF-50-B is produced with Remarks Code G29 or G30 to document the most current period of intermittent service.
    - any excess nonpay status whenever a return to duty personnel action is processed.
  - Complete this field on official change actions only if the date must be corrected because:
    - the agency has determined that the date originally furnished included prior noncreditable service.
    - the agency has determined that the date originally furnished must be adjusted to include prior creditable service and/or nonpay status from a previous calendar year(s).
  - If a personnel action is processed only to adjust this date, all related counters (e.g., intermittent time recorded on the database intermittent record (IRIS Program 129) or nonpay status recorded on the database non pay leave record (IRIS Program 140) are zeroed out by the Payroll/Personnel System.
- However, when a return to duty is processed, or a corrected T&A is processed to change or correct hours previously charged as leave without pay, the related counters are not adjusted or zeroed out by the Payroll/Personnel System.

**SCD Leave** (*cont'd*)

To restore or zero out the intermittent counters, process a document in PRES Document Type 031, Master File Change Document. To restore or zero out nonpay status time, key in the necessary data in the Time Inquiry System (TINQ).

**Data Entry**

*Accession:* Required

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* N/A

*Updating Action:* N/A

System Required Only  
Reference

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**Work Schedule** (*alpha field; 1 position*). Used to identify the time basis an employee is scheduled to work. Based on this code, the Payroll/Personnel System will generate the seasonal/status quo code and type of employment code.

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### Completion Instructions

- Enter one of the following codes:

#### Code Definition

- F** Full-time. A schedule that usually requires an employee to work 40 hours as prescribed by the administrative work week for that particular employment group or class.
- G** Full-time seasonal. A schedule that requires an employee to work full-time for less than 12 months each year on an annually recurring basis.
- I** Intermittent. A schedule that requires an employee to work an irregular number of hours or days for which there is no prearranged scheduled tour of duty.
- J** Intermittent seasonal. A schedule that requires an employee to work less than 12 months a year on an annually recurring basis, and that requires an employee to work an irregular number of hours or days for which there is no prearranged scheduled tour of duty.
- P** Part-time. A schedule that requires an employee to work less than full-time, but for a specific number of hours (usually 16-32 per administrative work week) on a prearranged scheduled tour of duty.
- Q** Part-time seasonal. A schedule that requires an employee to work part-time for less than 12 months each year on an annually recurring basis.
- S** Part-time job sharer. A schedule that requires an employee who is job sharing to work less than full-time, but for a specific number of hours

(usually 16-32 per administrative work week) on a prearranged scheduled tour of duty.

- T** Part-time seasonal job sharer. A schedule that requires an employee who is job sharing to work part-time for less than 12 months each year on an annually recurring basis.

#### Additional Information

- If the employee is part-time, the Duty Hours Per Pay Period field must be completed.
- If the employee is intermittent, the FEGLI and FEHB Coverage fields must both denote the code for ineligible, unless the employee is eligible to continue this coverage due to continuity of service.
- Enter Code **I** if the employee is hired without compensation.
- A split Time and Attendance Report (T&A) may be required if the effective date of the personnel action, which is changing or correcting this field, is other than the first Sunday of the processing pay period. For detailed information on split T&A's, see the T&A procedure.
- If a change in work schedule is processed, the Work Schedule field must be completed and must be different than that currently recorded in the employee's database salary data record (IRIS Program 101).

#### Data Entry

*Accession:* Required

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* N/A

*Updating Action:* N/A

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**Duty Hours Per Pay Period** (*numeric field; 4 positions*). Used to identify the scheduled number of hours a part-time employee is to work per pay period.

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**Completion Instructions**

- Enter the whole hours in the first two spaces and zeros in the last two spaces.
- Hours must be entered in this field when the Work Schedule field is *P, Q, R, S, or T*.

**Additional Information**

- A split Time and Attendance Report (T&A) may be required if the effective date of the personnel action, which is changing or correcting this field, is other than the first Sunday of the processing pay period. For

detailed information on split T&A's, see the T&A procedure.

**Data Entry**

*Accession:* Required if the work schedule indicates part time employment.

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* N/A

*Updating Action:* N/A

---

**Education Level** (*numeric field; 2 positions*). Used to identify the highest level of the employee's educational attainment based on years of formal schooling and/or academic degrees or certificates conferred.

---

**Completion Instructions**

☐ Enter one of the following codes:

**Code Definition**

- 01** No formal education or some elementary school - did not complete. Elementary school means grades 1 through 8, or equivalent, not completed.
- 02** Elementary school completed - no high school. Grade 8 or equivalent completed.
- 03** Some high school - did not graduate. High school means grades 9 through 12, or equivalent.
- 04** High school graduate or certificate of equivalency.
- 05** Terminal occupational program - did not complete. Program extending beyond grade 12, usually no more than three years; designed to prepare students for immediate employment in an occupation or cluster of occupations; not designed as the equivalent of the first two or three years of a baccalaureate degree program. Includes cooperative training or apprenticeship consisting of formal classroom instruction coupled with on-the-job training.
- 06** Terminal occupational program - certificate of completion, diploma or equivalent. See Code 05 above for definition of terminal occupational program. Two levels are recognized: (1) the technical and/or semi-professional level preparing technicians or semiprofessional personnel in engineering and nonengineering fields; and (2) the craftsman/clerical level of training artisans, skilled operators, and clerical workers.
- 07** Some college - less than 1 year. Less than 30 semester hours completed.
- 08** 1 year of college. 30-59 semester hours or 45-89 quarter hours completed.
- 09** 2 years of college. 60-89 semester hours or 90-134 quarter hours completed.
- 10** Associate degree. 2-year college degree program completed.

- 11** 3 years of college. 90-119 semester hours or 135-179 quarter hours completed.
- 12** 4 years of college. 120 or more semester hours or 180 or more quarter hours completed - no baccalaureate (Bachelor's) degree.
- 13** Bachelor's degree. Requires completion of at least four, but not more than 5, years of academic work; includes Bachelor's degree conferred in a cooperative plan or program that provides for alternate class attendance and employment in business, industry, or government to allow student to combine actual work experience with college studies.
- 14** Post-Bachelor's. Some work beyond (at a higher level than) the Bachelor's degree but no additional higher degree.
- 15** First professional. Signifies the completion of academic requirements for selected professions that are based on programs requiring at least two academic years of previous college work for entrance and a total of at least six academic years of college work for completion, e.g., Dentistry (D.D.S. or D.M.D.), Law (L.L.B. or J.D.), Medicine (M.D.), Theology (B.D.), Veterinary Medicine (D.V.M.), Chiropody or Podiatry (D.S.C.), Optometry (O.D.), and Osteopathy (D.O.).
- 16** Post-first professional. Some work beyond (at a higher level than) the first professional degree but no additional higher degree.
- 17** Master's degree. For liberal arts and sciences customarily granted upon successful completion of one (sometimes two) academic years beyond the Bachelor's degree. In professional fields, an advanced degree beyond the first professional but below the Ph.D., e.g., the LL.M.; M.S. in surgery following the M.D.; M.S.D., Master of Science in Dentistry; M.S.W., Master of Social Work.
- 18** Post-master's. Some work beyond (at a higher level than) the Master's degree but no additional higher degree.

**Education Level** (*cont'd*)

**Code Definition** (*cont'd*)

- 19** Sixth-year degree. Includes such degrees as Advanced Certificate in Education, Advanced Master of Education, Advanced Graduate Certificate, Advanced Specialist in Education Certificate, Certificate of Advanced Graduate Study, Certificate of Advanced Study, Advanced Degree in Education, Specialist in Education, Licentiate in Philosophy, Specialist in Guidance and Counseling, Specialist in Art, Specialist in Science, Specialist in School Administration, Specialist in School Psychology, Licentiate in Sacred Theology.
- 20** Post-sixth degree. Some work beyond (at higher level than) the sixth-year degree but no additional higher degree.
- 21** Doctorate degree. Includes such degrees as Doctor of Education, Doctor of Juridical Science, Doctor of Public Health, and the Ph.D. (or equivalent) in any field. Does not include a Doctor's degree that is a first professional degree, per code 15.

- 22** Post-doctorate. Work beyond the Doctorate.

**Additional Information**

☐ If this field is 6, 10, 13 or higher, then the Year Deg/Cert Received and Instructional Program fields must also be completed.

☐ This data is part of the employee's official education record and is reported to the CPDF.

**Note:** Additional academic information entered through PRES Document Type 123, Education Document (see the PRES procedure), is not reported to the CPDF.

**Data Entry**

*Accession:* Required

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* N/A

*Updating Action:* N/A

---

**Year Deg/Cert Received** (*numeric field; 2 positions*). Used to identify the calendar year during which the employee received the academic degree or certificate shown for education level.

---

**Completion Instructions**

- Enter the last two digits of the year the employee received the degree or certificate.

**Additional Information**

- Complete this field and the Instructional Program field only if the Educational Level field is 6, 10, 13 or higher.
- This data is part of the employee's official education record and is reported to the CPDF.

**Note:** Additional academic information entered through PRES Document Type 123, Education Docu-

ment (see the PRES procedure), is not reported to the CPDF.

**Data Entry**

*Accession:* Required if the educational level is 6, 10, 13 or higher.

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field and/or the education level is corrected or changed to 6, 10, 13 or higher.

*Separation:* N/A

*Updating Action:* N/A

---

**Instructional Program** (*numeric field; 6 positions*). Used to identify the employee's major field of study beyond high school.

---

**Completion Instructions**

Enter the six digit code that identifies what type of degree or certificate the employee received. Refer to OPM instructions for valid codes.

**Additional Information**

Complete this field and Year Deg/Cert Received only if the Educational Level field is *6, 10, 13* or higher.

This data is part of the employee's official education record and is reported to the CPDF.

**Note:** Additional academic information entered through PRES Document Type 123, Education Docu-

ment (see the PRES procedure), is not reported to the CPDF.

**Data Entry**

*Accession:* Required if the educational level is *6, 10, 13* or higher.

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field and/or the education level is corrected or changed to *6, 10, 13* or higher.

*Separation:* N/A

*Updating Action:* N/A

---

**Citizenship Status** (*numeric field; 1 position*). Used to identify whether the employee is a U.S. Citizen.

---

**Completion Instructions**

Enter one of the following codes:

**Code Definition**

*1* A citizen of the U.S. by birth or naturalization  
*8* Other

**Data Entry**

*Accession:* Required

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* N/A

*Updating Action:* N/A

---

**Veterans Status** (*alpha field; 1 position*). Used to identify whether the employee is a veteran who served during the Vietnam Era (August 6, 1964 through May 7, 1975).

---

**Completion Instructions**

Enter one of the following codes that denotes the employee's veteran's status:

**Code Definition**

- B** Pre-Vietnam-era veteran. A veteran whose service ended before the Vietnam era (i.e., before August 5, 1964). Use only for an employee whose accession was after September 30, 1991.
- N** Not a Vietnam-era veteran. Employee may or may not be a veteran, but is not a veteran of the Vietnam era (i.e., employee did not serve during the period August 5, 1964 through May 7, 1975). Use only for an employee whose accession was prior to October 1, 1991.
- P** Post-Vietnam-era veteran. A veteran whose service began after the Vietnam era (i.e., May 7, 1975). Use only for an employee whose accession was after September 30, 1991.

- V** Vietnam-era veteran. A veteran who served during the Vietnam era (i.e., from August 5, 1964 through May 7, 1975).
- X** Not a veteran. Use only for an employee whose accession was after September 30, 1991.

**Additional Information**

If the Veterans status is **V**, the Veterans Preference field must be 2, 3, 4, or 6.

**Data Entry**

*Accession:* Required

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* N/A

*Updating Action:* N/A

---

**TSP Eligibility Code** (*numeric field; 1 position*). Used to identify whether or not a Federal Employees' Retirement System (FERS), Civil Service Retirement System (CSRS), CSRS-Offset, Foreign Service Pension System (FSPS), or Foreign Service Retirement & Disability Service (FS) employee is eligible to participate in the Thrift Savings Plan for Federal employees.

---

### Completion Instructions

☐ Enter one of the following codes that denotes the employee's TSP eligibility:

#### Code Definition

- 1 Eligible for the 1-percent basic Government contributions during the *first* TSP open season (FERS employees only).
- 2 Eligible for the 1-percent basic Government contributions during the *second* TSP open season (FERS employees only).
- 3 Eligible to participate immediately in employee contributions (FERS, CSRS, CSRS-Offset); FERS employees are also eligible immediately for the 1-percent basic Government contributions.
- 4 Immediate eligibility for the 1-percent basic Government contributions; previously terminated TSP contributions; employees are eligible to contribute to TSP during the *first* TSP open season.
- 5 Immediate eligibility for the 1-percent basic Government contributions; previously terminated TSP contributions; employees are eligible to contribute to TSP during the *second* TSP open season.
- 6 Ineligible to participate in TSP.

### Additional Information

☐ Enter Code *1* for *FERS employees only*. These employees are eligible to participate immediately in employee contributions; however, the agency 1-percent basic Government contributions and the agency matching funds will not be applied until the *first* TSP open season. (This applies to new hires, transfers, or rehires not yet eligible for the 1-percent basic Government contributions.)

☐ Enter Code *2* for *FERS employees only*. These employees are eligible to participate immediately in employee contributions; however, the agency 1-percent ba-

sic Government contributions and the agency matching funds will not be applied until the *second* TSP open season. (This applies to new hires, transfers, or rehires not yet eligible for the 1-percent basic Government contributions.)

☐ Enter Code *3* for:

- (a) all CSRS and CSRS-Offset transfers (except if they terminated their TSP contributions)
- (b) CSRS and CSRS-Offset rehires
- (c) FERS employees who transfer from another Federal agency/payroll system without a break in service who were making TSP contributions and receiving the 1-percent basic Government contributions and the agency matching funds
- (d) FERS employees who are rehired after a break in service of *less than 31 days* who were making TSP contributions, receiving the 1-percent basic Government contributions and receiving the agency matching funds immediately prior to their separation
- (e) FERS employees who transfer from another Federal agency/payroll system without a break in service who are *not* making employee contributions but are receiving the 1-percent basic Government contributions (except if they terminated their TSP contributions)
- (f) FERS employees who are rehired after a break in service of *31 days or more* who were previously eligible to receive 1-percent basic Government contributions and/or agency matching funds, the 1-percent basic Government contributions and agency matching funds (if making employee contributions will begin immediately)

**Note:** FERS, CSRS, and CSRS-Offset employees with a break in service of *less than 31 days* are considered transfers and TSP contributions must be based on their last Form TSP-1, Thrift Savings Plan Election Form.

☐ Enter Code *4* for:

- (a) FERS employees who had terminated their TSP contributions *during the last* TSP open season before transferring to a new Federal

▶ agency/payroll system, and are eligible immediately for the agency 1-percent basic Government contributions and eligible to contribute to TSP during the *first* TSP open season

- (b) CSRS or CSRS-Offset employees who had terminated their TSP contributions *during* the *last* TSP open season or are not currently contributing to TSP before transferring to a new Federal agency/payroll system, and are eligible to contribute to TSP during the *first* TSP open season

□ Enter Code *5* for:

- (a) FERS employees who had terminated their TSP contributions *after* the *last* TSP open season before transferring to a new Federal agency/payroll system, and are eligible immediately for the agency 1-percent basic Government contributions and eligible to contribute to TSP during the *second* TSP open season
- (b) CSRS or CSRS-Offset employees who had terminated their TSP contributions *after* the *last* TSP open season before transferring to a new Federal agency/payroll system, and are eligible to contribute to TSP during the *second* TSP open season

□ Enter Code *6* for employees with retirement coverage codes of *2* (FICA); *4* (none, except for reemployed annuitants who have an annuity code of 1, 4, or 5); *5* (other retirement system); *J* (FICA and other Federal

Retirement - Partial Rate); or *X* (FICA and Other Retirement - Full Rate).

□ TSP Eligibility Code 9 is system generated. The Payroll/Personnel System will replace the TSP eligibility code established through PACT, EPIC, or FESI with TSP Eligibility Code 9 when a FERS employee begins receiving the 1-percent basic Government contributions, or when Form TSP-1 is initially processed for a CSRS/CSRS-Offset employee. Once established, TSP Eligibility Code 9 will be permanently retained in the employee's thrift savings data database record (IRIS Program 118) even if the employee terminates his/her TSP contributions. The employee's eligibility to again participate in TSP (following termination of the employee's TSP contributions) is determined by the TSP Status Code and the Effective Date of Status Change fields on the employee's thrift savings data database record (IRIS Program 118). For more information on the TSP Status Code and Effective Date of Status Change, see the EPIC or Payroll/Personnel Remote Entry System (PRES) procedures. ▶

#### Data Entry

*Accession:* Required

*Official Change:* N/A

▶ *Official Change:* Required if (1) the NOAC on the processing personnel action indicates a change or correction to this field or, (2) the NOAC indicates a change to a FERS retirement coverage code and the employee is not enrolled in TSP. ▶

*Separation:* N/A

*Updating Action:* Required if the personnel action is processed to change or correct this field.

---

**SCD-TSP** (*numeric field; 6 positions*). Used to identify the beginning date of the vesting period for the 1 percent Government contributions to the Thrift Savings Plan (TSP).

---

#### Completion Instructions

- Enter the SCD-TSP as 6 numeric characters in month, day, and year order (e.g., **060994**). Do not enter any punctuation.
- Do **not** complete this field if the employee is a **temporary** employee or if the employee is covered by the CSRS Offset (Congressional) (FICA) retirement coverage plan.
- Do **not** complete this field if the employee is: (1) **not eligible** to participate in TSP and (2) is **not covered** by the Federal Employee's Retirement System (FERS) or an equivalent retirement coverage plan.
- This date cannot be earlier than 01/01/84.

- This date cannot be later than the effective date of the processing personnel action.

#### Additional Information

- If previous service cannot be verified at the time of the accession, enter the effective date of the accession. This date must be adjusted upon verification of prior civilian service.

#### Data Entry

*Accession:* N/A

*Official Change:* N/A

*Separation:* N/A

*Updating Action:* Required if the personnel action is processed to change or correct this field.

---

**SCD-RIF** (*numeric field; 6 positions*). Used to identify the employee's service date for reduction-in-force (RIF) purposes.

---

#### Completion Instructions

- Enter the SCD RIF as 6 numeric characters in month, day, and year order (e.g., **060994**). Do not enter any punctuation.
- This date cannot be later than the effective date of the processing personnel action.
- Do not complete this field if the type of appointment is **04** (competitive-temporary) or **09** (excepted-temporary).
- If this date and the date entered in the SCD Leave field are the same, do not complete this field. The date entered in the SCD Leave field will be generated in this field.
- If this date and the date entered in the SCD Leave field are different, enter the SCD RIF in this field.

#### Additional Information

- Process an updating action and adjust the SCD RIF to record:
  - full-time, part-time, or intermittent service prior to the accession which is creditable for RIF purposes,
  - breaks in service prior to the effective date of the accession,
  - any nonpay status.

#### Data Entry

*Accession:* Required if the type of appointment code is other than **04** or **09**.

*Official Change:* N/A

*Separation:* N/A

*Updating Action:* Required if the personnel action is processed to change or correct this field.

---

**SCD WGI** (*numeric field; 6 positions*). Used to identify the date from which service is to be credited toward the employee's next within-grade salary increase.

---

### Completion Instructions

- Complete this field for any employee who will be entitled to a within-grade increase. Enter the SCD WGI as 6 numeric characters in month, day, and year order (e.g., **060994**). Do not enter any punctuation.
- If previous service is unknown, enter the effective date of the accession personnel action.
- If this field is left blank, the effective date of the processing personnel action will be generated for this field if the nature of action code is:
  - 100 - Career Appt
  - 101 - Career Cond Appt
  - 102 - Career Exec Assign
  - 103 - Career Cond Exec Assign
  - 104 - Non-Career Exec Assign
  - 140 - Reins - Career Appt
  - 141 - Reins - Career Cond Appt
  - 170 - Excepted Appt
- This date cannot be later than the effective date of the processing personnel action.

### Additional Information

- If the date is **prior** to the effective date of the accession, adjust the date to include any previous service which is creditable toward the within-grade increase waiting period. Do not adjust this date to include periods of nonpay status; nonpay status data must be entered through PRES Document Type 160, Record of Leave Data Transferred.

If this date is not furnished at the time of the accession personnel action, the Payroll/Personnel System will not maintain any record of creditable service and/or nonpay status.

### Data Entry

*Accession:* Required if the employee is eligible to receive a within-grade increase.

*Official Change:* N/A

*Separation:* N/A

*Updating Action:* Required if the personnel action is processed to change or correct this field.

---

**Type Of Appointment** (*numeric field; 2 positions*). Used to identify the type of appointment which the employee has accepted.

---

### Completion Instructions

☐ Enter one of the following codes that denotes the type of appointment the employee will hold:

#### Code Definition

<b>01</b>	Competitive-Career , SES-Career
<b>02</b>	Competitive-Career-Conditional
<b>03</b>	Competitive-Term, Taper, Indefinite SES-Military Term or Emergency
<b>04</b>	Competitive-Temporary, Special Need, SES-Time Limited/Career
<b>06</b>	Excepted-Permanent, SES-Noncareer
<b>07</b>	Excepted-Conditional
<b>08</b>	Excepted-Indefinite, Excepted-Limited (More than 1 year)
<b>09</b>	Excepted-Temporary, SES-Time-Limited-Noncareer

### Additional Information

☐ This data element is used in reporting employment statistics to the Office of Management and Budget (OMB) and OPM, particularly for the SF-113 series on work force statistics.

☐ Type Of Appointment Codes **01**, **02**, **06**, and **07** designate permanent employees.

☐ When the Type Of Appointment field is changed from **04** or **09** to **01-03** or **06-09**, the SCD RIF field must be completed on the processing personnel action.

☐ When the NOAC is **100**, **140**, **500**, or **540**, the Type Of Appointment field must be **01**.

☐ When the NOAC is **101**, **103**, **141**, **501**, **503**, or **541**, the Type Of Appointment field must be **02**.

☐ When the Type Of Appointment field is **01** or **06** and the Tenure Group field is **2**, the Probation Period Start Date field must be completed on the processing personnel action.

☐ The Type Of Appointment field must be **04** or **09** if the Tenure Group field is **0**.

☐ The Type Of Appointment field must be **01** or **06** if the Tenure Group field is **1**.

☐ The Type Of Appointment field must be **01**, **02**, **06**, or **07** if the Tenure Group field is **2**.

☐ The Type Of Appointment field must **03**, **08**, or **09** if the Tenure Group field is **3**.

☐ When the Tenure Group field is **2** and the Type Of Appointment field is **02**, the Career Tenure Date field must be completed on the processing personnel action.

☐ A split Time and Attendance Report (T&A) may be required if the effective date of the personnel action, which is changing or correcting this field, is other than the first Sunday of the processing pay period. For detailed information on split T&A's, see the T&A procedure.

### Data Entry

*Accession:* Required

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* N/A

*Updating Action:* N/A

**FEHB Coverage** (*numeric field; 1 position*). Used to identify the employee's eligibility for participation in the Federal Employee's Health Benefits Program (FEHB), and if eligible, whether they are participating.

**Completion Instructions**

- Enter one of the following FEHB coverage codes:

**Code Definition**

2	Ineligible	
3	Waived	
4	Eligible - pending	
5	Cancelled	
6	Court Ordered Enrollment	564
7	Court Ordered - Eligible - Pending to Family Coverage	565
8	Court-Ordered - Self Only Coverage to Family Coverage	566

Transfer FEHB enrollment to OPM

Transfer FEHB enrollment to DC Retirement Plan. (If this remarks code is used, the retirement coverage code on the employee's database health benefits record (IRIS Program 115) must be Y or Z.)

Terminate FEHB - Not enrolled since first opportunity

Terminate FEHB - Not enrolled five years

Terminate FEHB - No survivor eligible to continue health benefits

**Additional Information**

- Enter **2** only if the employee is excluded from coverage under FEHB law or by regulations.
- Enter **3** or **5** only if the employee is (1) transferring into the Department or (2) being reemployed without a break in service of more than 3 days, and has cancelled or waived coverage under prior Federal employment.
- Enter **4** in all other cases. Do not enter Code 1 even if this option is known at the time of the accession. Code **1** is generated by the Payroll/Personnel System after the appropriate form (SF-2809 or SF-2810) is entered through PRES and applied to the employee's database health benefits record (IRIS Program 115). If the form is processed during the same pay period as the accession personnel action, the output SF-50-B will display code **1** even though **4** was entered. If the employee elects to enroll, FEHB deductions will begin during the pay period in which the SF-2809 or SF-2810 is processed and applied to the employee's database.
- This field must be present on a separation personnel action if the nature of action code indicates retirement, death, resignation in lieu of involuntary action, or involuntary termination.
- If the processing action is a retirement or death action, and the FEHB coverage code is **1**, one of the following Remarks Codes must be present on the processing action:

Employees who resign or terminate under Nature of Action Code 312, Resignation In Lieu of Involuntary Action, or NOAC 356, Termination - Involuntary, may be eligible for discontinued service retirement. These employees may be eligible to transfer their FEHB coverage to the Office of Personnel (OPM) if the conditions required for continuation of FEHB enrollment have been met. Therefore, one of the following remarks codes must be present on the processing personnel action whenever NOAC 312 or 356 is processed for an employee currently enrolled in FEHB:

**Remarks Code Definition**

**388** Terminate FEHB enrollment. (Enter this remarks code when the employee is ineligible to continue FEHB.)

**389** Transfer FEHB enrollment to OPM. (Enter this remarks code when the employee is eligible to continue FEHB coverage.)

**390** Transfer FEHB enrollment to DC Retirement System. (Enter this remarks code when the employee is under Retirement Coverage Code Y or Z only and is eligible to continue FEHB coverage.)

If the employee is eligible for non-Federal health benefits, enter the appropriate plan code in PRES Document Type 103, Non-Federal Health Benefits Form. For detailed information, see Insurance in the PRES procedure.

**Remarks Code Definition**

**388** Terminate FEHB enrollment

### FEHB Coverage (*cont'd*)

- ❑ Enter Code 2 if the employee is not eligible for FEHB but eligible for non-Federal health benefits. Enter the appropriate plan code in PRES Document Type 103. For detailed information, see Insurance in the PRES procedure.
- ❑ Enter Code 3 if the employee is eligible for non-Federal health benefits and elects to waive coverage.

### The Federal Employees Health Benefits Children's Equity Act

Public Law 106-394, the Federal Employees Health Benefits Children's Equity Act of 2000, enacted October 30, 2000, requires mandatory self and family coverage for FEHB-eligible employees who do not comply with a court or administrative order to provide health benefits for their children.

When a court or administrative order is received for an employee, agency personnel offices must determine if the employee is currently enrolled in a self and family plan that provides full benefits in the location where the children live, or, if the employee is not currently enrolled, whether or not the employee is eligible for FEHB coverage.

If the employee is not enrolled in a health plan, or the employee has not provided documentation indicating that he/she has other health coverage for their children, the agency must notify the employee that the court or administrative order has been received. The employee must respond by the end of the pay period following the one in which he/she received the notification from the agency.

#### If The Employee Does Not Enroll In FEHB

If the employee does not enroll in self and family coverage in a plan that provides full benefits to his/her children in the area where they live or provide documentation that he/she has other health coverage for their children, the agency must:

- ❑ process a SF-2809, Health Benefits Registration Form, to enroll the employee in self and family coverage in the standard option of the Blue Cross and Blue Shield Service benefit Plan (enrollment code 105).
- ❑ process a personnel action for mandatory FEHB coverage using NOAC 916 with authority code **BEG** to begin the deduction.
- ❑ enter Code 7 to indicate that the employee is *not* currently enrolled in FEHB and is court-ordered under the

provisions of Public Law 106-394 to provide FEHB family coverage.

#### If The Employee Is Currently Enrolled In FEHB And Has Self Only Coverage

- ❑ process a SF-2810, Change In Health Benefits Enrollment, and change the enrollment to self and family coverage in the same option of the same plan.
- ❑ process a personnel action for mandatory FEHB coverage using NOAC 916 with authority code **BEG** to begin the deduction.
- ❑ enter Code 8 to indicate that the employee is currently enrolled in FEHB under Self Only coverage and is court-ordered under the provisions of Public Law 106-394 to provide FEHB family coverage.

#### If The Employee Is Currently Enrolled In FEHB And Has Family Coverage

- ❑ process a personnel action for mandatory FEHB coverage using NOAC 916 with authority code **BEG** to begin the deduction.
- ❑ enter Code 6 to indicate that the employee is currently enrolled in FEHB with FEHB family coverage and is court-ordered under the provisions of Public Law 106-394 to provide FEHB family coverage.

**Note:** To end mandatory enrollment, process a personnel action for mandatory FEHB coverage using NOAC 916 with authority code **END** to stop the deduction..

### Data Entry

*Accession:* Required

*Official Change:* Required if the FEHB is corrected or changed, or a personnel action with NOAC 916 is processed to begin court or administrative ordered FEHB coverage. **Note:** Process SF-2809 or SF-2810 to indicate enrollment or to change or cancel enrollment. The FEHB coverage code will be changed automatically when the SF-2809 or SF-2810 is successfully processed through PINE.

*Separation:* Required if the NOAC on the processing personnel action indicates: retirement, death, resignation in lieu of involuntary action, or involuntary termination.

*Updating Action:* N/A

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**Losing/Gaining Department** (*alphanumeric field; 2 positions*). Used to identify the Federal department or place of employment for an employee moving into or out of a Federal department.

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**Completion Instructions**

- Refer to OPM instructions for the codes assigned to the various Departments of the Federal government if the employee is transferring to or from another Federal department.
- Enter one of the following losing or gaining codes if the employee is transferring to or from an entity other than another Federal department:

Code	Definition
1A	Military
2A	University employee
3A	Student
4A	Self-employed
5A	Retirement

- 6A Foreign country or corporation
- 7A Private industry
- 8A Unemployment
- 9A State or local government
- 1B Unknown
- 1C Death

**Data Entry**

*Accession:* Required

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* Required

*Updating Action:* N/A

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**Appointment Limitations - Full Dollars Hours Days** (*3 separate numeric fields: Dollars = max. of 7 positions; Hours = max. of 6 positions; Days = max. of 3 positions*). Identifies the type and amount of any limitation set on the employee's appointment.

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### Completion Instructions

- If the appointment limitation is based on a fixed dollar amount, enter the amount in the Full Dollars field. The first five digits are whole dollars and the last two digits are cents.
- If the appointment limitation is based on a fixed hour amount, enter the number of hours in the Full Hours field. The first four digits are whole hours and the last two digits are fractional hours (e.g., 1039 1/2 hours is entered as **103950**).
- If the appointment limitation is based on a fixed day amount, enter the number of days in the Full Days field. Only whole days are valid.

### Additional Information

- Whenever a full amount is entered in any of the Appointment Limitations fields, a balance amount must be entered.
- To correct the Full and/or Balance Amount fields, enter the full limitation amount, and then enter the limitation balance amount as of the end of the pay period immediately preceding the one in which the correction is being processed.
- The full limitation amount and balance limitation amount are recorded on the employee's database dates and misc sal/pers data record (IRIS Program 102). The Payroll/Personnel System reduces the full amount by the number of dollars, hours, or days the employee works each pay period.

- A split Time and Attendance Report (T&A) may be required if the effective date of the personnel action, which is changing or correcting any of these fields, is other than the first Sunday of the processing pay period. For detailed information on split T&A's, see the T&A procedure.
- CULPRPT Report Number P0137, Employees With Appointment Limitations, lists employees with appointment limitations and displays the balance amount of dollars, hours, or days. For detailed information on CULPRPT, see the CULPRPT procedure.
- Report Number AECO37T1, Employees Approaching Expiration of Limited Appointment - Temporary, is produced each pay period and is distributed to agency personnel offices to identify those employees approaching expiration of appointments. This report is produced 3 pay periods prior to the expiration date.
- To remove a limitation, enter the maximum amount of zeros in the appropriate type of Full and Balance Limitation fields.

### Data Entry

*Accession:* Required if the employee's appointment is based on a fixed dollar, hour, or day limitation amount.

*Official Change:* Required if the NOAC on the processing personnel action indicates an extension of the appointment limitation full dollars, hours, or days.

*Separation:* N/A

*Updating Action:* N/A

---

**Appointment Limitations - Balance Dollars Hours Days** (*3 separate numeric fields: Dollars = max. of 7 positions; Hours = max. of 6 positions; Days = max. of 3 positions*). Identifies the type and balance amount of any limitation set on the employee's appointment.

---

### Completion Instructions

- If the full appointment limitation is based on a fixed dollar amount, enter the amount in the Balance Dollars field. The first five digits are whole dollars and the last two digits are cents.
- If the full appointment limitation is based on a fixed hour amount, enter the number of hours in the Balance Hours field. The first four digits are whole hours and the last two digits are fractional hours (e.g., 1039 1/2 hours is entered as **103950**).
- If the full appointment limitation is based on a fixed day amount, enter the number of days in the Balance Days field. Only whole days are valid.

### Additional Information

- Whenever a full amount is entered in any of the Appointment Limitations fields, a balance amount must be entered.
- To correct the Full and/or Balance Amount fields, enter the full limitation amount, and then enter the limitation balance amount as of the end of the pay period immediately preceding the one in which the correction is being processed.
- The full limitation amount and balance limitation amount are recorded on the employee's database dates and misc sal/pers data record (IRIS Program 102). The full amount is reduced by the number of dollars, hours, or days the employee works each pay period.

- A split Time and Attendance Report (T&A) may be required if the effective date of the personnel action, which is changing or correcting these fields, is other than the first Sunday of the processing pay period. For detailed information on split T&A's, see the T&A procedure.
- CULPRPT Report Number P0137, Employees With Appointment Limitations, lists employees with appointment limitations and displays the balance amount of dollars, hours, or days. For detailed information on CULPRPT, see the CULPRPT procedure.
- Report Number AECO37T1, Employees Approaching Expiration of Limited Appointment - Temporary, is produced each pay period and is distributed to agency personnel offices to identify those employees approaching expiration of appointments. This report is produced 3 pay periods prior to the expiration date.
- To remove a limitation, enter the maximum amount of zeros in the appropriate type of full and balance limitation fields.

### Data Entry

*Accession:* Required if the employee's appointment is based on a fixed dollar, hour, or day limitation amount.

*Official Change:* Required if the NOAC on the processing personnel action indicates an extension of the appointment limitation balance dollars, hours, or days.

*Separation:* N/A

*Updating Action:* N/A

---

**Commencing Date Of Service Year** (*numeric field; 6 positions*). Identifies the date on which the employee's service year begins. A service year is a 12 to 24 month period beginning with the date of the first appointment under an authority that establishes a dollar, hour, or day limitation which cannot be exceeded within the service year.

---

**Completion Instructions**

Enter the commencing date of service year as 6 numeric characters in month, day, and year order (e.g., *060994*). Do not enter any punctuation.

**Additional Information**

- If a dollar, hour, or day limitation was entered in the Full and Balance fields, this field must be completed.
- A split Time and Attendance Report (T&A) may be required if (1) the effective date of the personnel action, which is changing or correcting this field, is other than the first Sunday of the processing pay period or (2) if the

service year expires on a date other than the first day of the pay period. For detailed information on split T&A's, see the T&A procedure.

**Data Entry**

*Accession:* Required if the employee's appointment is based on a fixed dollar, hour, or day limitation amount.

*Official Change:* Required if the NOAC on the processing personnel action indicates an extension of the appointment limitation balance dollars, hours, or days.

*Separation:* N/A

*Updating Action:* N/A

---

**Sup-Mgr-Prob Period Required** (*numeric field; 1 position*). Used to record whether a supervisory/managerial probationary period is required, served, or waived.

---

**Completion Instructions**

Enter one of the following codes to indicate if a supervisory/managerial probationary period is required, served, or waived:

**Code Definition**

0	Not required
1	Required
2	Served
3	Waived

**Additional Information**

- Senior Executive Service (Pay Plans ES and FE) do **not** serve supervisory/managerial probationary periods. Career SES employees serve an **SES** probationary period.
- Employees in the Excepted Service are **not required** to serve a supervisory/managerial probationary period

**Data Entry**

*Accession:* Required if the supervisory/managerial code in the Position Management System (PMSO) is **2** and the type of appointment code is **01** or **02**.

*Official Change:* Required if the NOAC on the processing personnel action changes or corrects the supervisory/managerial code in PMSO to **2**, and the type of appointment code recorded on the employee's database dates & misc sal/pers data record (IRIS Program IR102) is **01** or **02**. Also required if the NOAC on the processing personnel action changes or corrects the type of appointment code recorded on the employee's database dates & misc sal/pers data record (IRIS Program IR102) to **01** or **02** and the supervisory/managerial code in PMSO is **2**.

*Separation:* N/A

*Updating Action:* N/A

---

**Probationary Period Start Date** (*numeric field; 6 positions*). Used to identify that the employee's appointment is subject to completion of a year probationary (or trial) period and to show the commencing date of the probationary period.

---

### Completion Instructions

Enter the probationary period start date as 6 numeric characters in month, day, and year order (e.g., **060996**). Do not enter any punctuation.

### Additional Information

The Payroll/Personnel System will automatically remove this date once a year of creditable service has been completed. Do not process a personnel action to remove this date upon completion of the probationary or trial period.

If previous service is unknown, enter the effective date of the accession personnel action.

If this field is left blank, the effective date of the processing personnel action will be generated for this field only if the nature of action code is:

100 - Career Appt

101 - Career Cond Appt

140 - Reins - Career Appt

141 - Reins - Career Cond Appt

170 - Excepted Appt

This date cannot be later than the effective date of the accession personnel action.

If this date is **prior** to the effective date of the accession, adjust the date to include any previous service which is creditable toward the probationary or trial waiting period. Do not adjust this date to include prior periods of nonpay status; this data must be entered through PRES Document Type 160, Record of Leave Data Transferred.

When this date is initially furnished, the Payroll/Personnel System begins maintaining two records, creditable service and nonpay status, as shown on the T&A and as recorded on personnel actions. Creditable service

is recorded on the employee's database intermittent record (IRIS Program 129) and nonpay status is recorded on the employee's non pay leave record (IRIS Program 140).

The probationary period start date is displayed on the employee's database dates and misc sal/pers data record (IRIS Program 102).

If the agency personnel office processes a personnel action which changes or corrects the date previously furnished, the creditable service is disregarded, and beginning with the processing pay period in which the personnel action was processed, a new record of creditable service is started. However, the nonpay status record maintained since the date was originally furnished remains unchanged.

The Payroll/Personnel System credits full calendar time for periods of full-time and part-time service, and seven days calendar time for every five days of intermittent service. Creditable service is reduced for each workday in nonpay status (other than for military furlough or compensable injury) which exceeds 22 workdays; e.g., up to 22 days of nonpay is considered creditable service since it is forgiven.

Report Number AECO36T2, Notification of Expiration of Probationary or Trial Period, is produced each pay period and distributed to agency personnel offices to identify those employees approaching expiration of probationary or trial periods. This report is produced 4 months prior to the expiration date.

Employees who have previous service which is creditable toward this date may not be required to serve the complete probationary period. Agency personnel offices must maintain manual records for these employees.

To remove or cancel a date in this field, enter **six zeros**.

**Probationary Period Start Date** *(cont'd)*

**Data Entry**

*Accession:* Required if the employee's appointment is subject to completion of a probationary or trial period.

*Official Change:* Required if the NOAC on the proces-

sing personnel action indicates a change or correction to this field.

*Separation:* N/A

*Updating Action:* Required if the personnel action is processed to remove or cancel this date (enter **six zeros**).

System Retired  
Reference Only

---

**Career Tenure Date** (*numeric field; 6 positions*). Used to identify the beginning date for counting service toward career or permanent tenure.

---

### Completion Instructions

Enter the career tenure date as 6 numeric characters in month, day, and year order (e.g., **060994**). Do not enter any punctuation.

### Additional Information

If previous service is unknown, enter the effective date of the accession personnel action.

If this field is left blank, the effective date of the processing personnel action will be generated for this field only if the nature of action code is:

100 - Career Appt

101 - Career Cond Appt

102 - Career Exec Assign

103 - Career Cond Exec Assign

104 - Non-Career Exec Assign

140 - Reins - Career Appt

141 - Reins - Career Cond Appt

170 - Excepted Appt

The date cannot be later than the effective date of the accession personnel action.

If the date is **prior** to the effective date of the accession, adjust the date to include any previous service which is creditable toward the career-tenure waiting period. Do not adjust this date to include prior periods of nonpay status; this data must be entered through PRES Program Type 160, Record of Leave Data Transferred.

For Taper and Indefinite appointments in the competitive service, show the beginning date of creditable service toward career status under P.L.90-105.

Do not complete this field if service is not creditable, e.g., Schedule B student appointments or VRA appointments. The Payroll/Personnel System will automatically remove this date once a minimum of three years of creditable service has been completed.

If this date is not furnished at the time of the accession personnel action, the Payroll/Personnel System will not establish any record of creditable service and/or nonpay status.

When this date is initially furnished, the Payroll/Personnel System begins maintaining two records, creditable service and nonpay status, as shown on the T&A and as recorded on personnel actions. Creditable service is recorded on the employee's database intermittent record (IRIS Program 129) and nonpay status is recorded on the employee's nonpay leave record (IRIS Program 140).

To remove or cancel a date in this field, enter **six zeros**.

### Data Entry

*Accession:* Required if the employee's appointment is subject to completion of a three year career tenure period.

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* N/A

*Updating Action:* Required if the personnel action is processed to remove or cancel this date (enter **six zeros**).

---

**Supervisory/Managerial Probationary Period Starting Date** (*numeric field; 6 positions*). Used to identify the starting date for the supervisory/managerial probationary period, or for an SES probationary period.

---

**Completion Instructions**

Enter the supervisory/managerial or the SES probationary period starting date as 6 numeric characters in month, day, and year order (e.g., **060994**). Do not enter any punctuation.

**Additional Information**

If previous service is unknown, enter the effective date of the accession personnel action.

Employees who have previous service which is creditable toward this date may not be required to serve an additional probationary period. Agency personnel offices must maintain manual records for these employees.

To remove or cancel a date in this field, enter **six zeros**.

**Data Entry**

*Accession:* Required only if the supervisory code in PMSO is 2.

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* N/A

*Updating Action:* Required if the personnel action is processed to remove or cancel this date (enter **six zeros**).

---

**Annual Leave Category** (*numeric field; 1 position*). Used to identify the employee's annual leave earning status.

---

**Completion Instructions**

- Enter one of the following codes:

**Code Definition**

0	Ineligible to earn annual leave.
4	Earns 4 hours of annual leave per 80 hours of regular time in pay status.
6	Earns 6 hours of annual leave per 80 hours of regular time in pay status.
8	Earns 8 hours of annual leave per 80 hours of regular time in pay status.

**Additional Information**

- Enter 0 only if the employee is specifically excluded from earning annual leave based on provisions of the Annual and Sick Leave Act of 1951 as amended by PL-93-101, effective December 14, 1973.

- When the employee is eligible to earn annual leave, the SCD Leave field must be compatible with the annual leave category code entered in this field.

- Complete this field whenever a personnel action is processed to change or correct the SCD Leave field and the revised date changes the employee's annual leave category.

**Data Entry**

*Accession:* Required

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to the SCD for leave that will change the annual leave category.

*Separation:* N/A

*Updating Action:* Required if the personnel action is processed to change or correct this field.

---

**Leave Earning Status During Pay Period** (*alpha field; 1 position*). Used to identify if an employee is entitled to leave accruals for the first pay period of leave eligibility or for the last pay period of employment.

---

**Completion Instructions**

- Enter one of the following codes:

**Code Definition**

- N* The employee is not entitled to earn leave during this first (or last) pay period.
- Y* The employee is entitled to earn leave during this first (or last) pay period.

**Additional Information**

- This field represents entitlement to earn leave during the first or last pay period of employment; it does not indicate whether the employee accrues leave.

**Data Entry**

*Accession:* Required

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* Required if the employee is part-time or has an alternating tour of duty.

*Updating Action:* N/A

---

**Annual Leave Code - 45 Day** (*alpha field; 1 position*). Used to identify those employees who are stationed at an overseas foreign post of duty and are entitled to carry over from one leave year to another a maximum of 45 (360 hours) days annual leave accumulation.

---

**Completion Instructions**

- Enter one of the following codes:

**Code Definition**

- N* The employee is not entitled to carry forward 45 days of annual leave.
- Y* The employee is entitled to carry forward 45 days of annual leave.

**Additional Information**

- Adjustments of an employee's annual leave ceiling may be required when leave accrual entitlements change. These adjustments must be made by the agency

personnel office at the end of the current leave year and recorded on the T&A for processing of the first pay period of the new leave year.

**Data Entry**

*Accession:* Required

*Official Change:* Required if the employee's duty station is changing from or to an overseas foreign post of duty.

*Separation:* N/A

*Updating Action:* Required if the personnel action is processed to change or correct this field.

---

**Race and National Origin** (*alpha field; 1 position*). Used to identify the employee's race and national origin.

---

**Completion Instructions**

☐ Enter one of the following codes that denotes the employee's race and national origin:

**Code Definition**

**A American Indian or Alaskan Native.** A person having origins in any of the original peoples of North America, and who maintain cultural identification through community recognition or tribal affiliation. (This code must not be used for employees in Puerto Rico.)

**B Asian or Pacific Islander.** A person having origins in any of the Far East, Southeast Asia, the Indian subcontinent or the Pacific Islands. This area includes, for example, China, India, Japan, Korea, the Philippine Islands, and Samoa. (This code must not be used for employees in Hawaii or Puerto Rico.)

**C Black, not of Hispanic origin.** A person having origins in any of the black racial groups of Africa. Does not include persons of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish cultures or origins (see Hispanic). (This code must not be used for employees in Puerto Rico.)

**D Hispanic.** A person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish cultures or origins. Does not include persons of Portuguese culture or origin.

**E White, not of Hispanic origin.** A person having origins in any of the original peoples of Europe, North Africa, or the Middle East. Also includes persons not included in other categories. Does not include persons of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish cultures or origins (see Hispanic). (This code must not be used for employees in Puerto Rico.)

**F Asian Indian.** A person having origins in any of the original peoples of the Indian subcontinent; i.e., India, Pakistan, Bangladesh, Sri Lanka,

Nepal, Sikkim, and Bhutan. (This code is for use in Hawaii only.)

**G Chinese.** A person having origins in any of the original peoples of China. (This code is for use in Hawaii only.)

**H Filipino.** A person having origins in any of the original peoples of the Philippines. (This code is for use in Hawaii only.)

**J Guamanian.** A person having origins in any of the original peoples of Guam (e.g., Chamorro). (This code is for use in Hawaii only.)

**K Hawaiian.** A person having origins in any of the original peoples of Hawaii. Includes persons who are part Hawaiian and identify most closely with the Hawaiian Category. (This code is for use in Hawaii only.)

**L Japanese.** A person having origins in any of the original peoples of Japan. (This code is for use in Hawaii only.)

**M Korean.** A person having origins in any of the original peoples of Korea. (This code is for use in Hawaii only.)

**N Samoan.** A person having origins in any of the original peoples of Samoa. (This code is for use in Hawaii only.)

**P Vietnamese.** A person having origins in any of the original peoples of Vietnam. (This code is for use in Hawaii only.)

**Q All Other Asian or Pacific Islanders.** A person having origins in any of the original peoples of Asia or the Pacific Islands not included in codes F through P above. (This code is for use in Hawaii only.)

**Y Not Hispanic in Puerto Rico.** A person not of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish cultures or origins whose official duty station is in Puerto Rico. (This code is for use in Puerto Rico only.)

**Race and National Origin** (*cont'd*)

this field or if the duty station is being changed to or from Puerto Rico or Hawaii.

**Data Entry**

*Accession:* Required

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to

*Separation:* N/A

*Updating Action:* N/A

System Retired  
Reference Only

---

**Handicap Code** (*numeric field; 2 positions*). Used to identify the physical or mental disabilities, or history of such disabilities, that are likely to cause an employee to experience difficulty in obtaining, maintaining, or advancing in employment.

---

**Completion Instructions**

Enter one of the following codes that denotes the employee's handicap:

**Code Definition**

- 01 Individual does not wish to have handicap status officially recorded, or has misidentified himself/herself.
- 05 No handicap
- 06 Handicap not listed

**Speech Impairments**

- 13 Severe speech malfunction or inability to speak, but has normal hearing.

**Hearing Impairments**

- 15 Hard-of-hearing
- 16 Total deafness in both ears, with understanding speech.
- 17 Total deafness in both ears, and unable to speak clearly.

**Vision Impairments**

- 22 Ability to read ordinary size print with glasses, but with loss of peripheral (side) vision.
- 23 Inability to read ordinary size print, not correctable by glasses.
- 24 Blind in one eye
- 25 Blind in both eyes

**Absences of Extremities, missing**

- 27 One hand
- 28 One arm
- 29 One foot
- 32 One leg
- 33 Both hands or arms
- 34 Both feet or legs
- 35 One hand or arm and one foot or leg
- 36 One hand or arm and both feet or legs
- 37 Both hands or arms and one foot or leg
- 38 Both hands or arms and both feet or legs

**Nonparalytic Orthopedic impairments, chronic pain, stiffness, or weakness**

- 44 One or both hands
- 45 One or both feet
- 46 One or both arms
- 47 One or both legs
- 48 Hip or pelvis
- 49 Back
- 57 Any combination of two or more parts of the body

**Partial Paralysis**

- 61 One hand
- 62 One arm, any part
- 63 One leg, any part
- 64 Both hands
- 65 Both legs, any part
- 66 Both arms, any part
- 67 One side of body, including one arm and one leg
- 68 Three or more major parts of the body

**Complete Paralysis**

- 70 One hand
- 71 Both hands
- 72 One arm
- 73 Both arms
- 74 One leg
- 75 Both legs
- 76 Lower half of body, involving legs
- 77 One side of body, including one arm and one leg
- 78 Three or more major members of the body (arms and legs)

**Other Impairments**

- 80 Heart Disease - with no limitation or restriction of activity
- 81 Heart disease - with limitation or restriction of activity
- 82 Convulsive disorders, for example: epilepsy
- 83 Blood diseases, examples: sickle cell anemia, leukemia, hemophilia, etc.

**Handicap Code (cont'd)**

- 84 Diabetes - controlled diabetes with no restriction of activity
- 86 Pulmonary or respiratory disorders
- 87 Kidney dysfunction
- 88 Cancer - complete recovery
- 89 Cancer
- 90 Mental retardation
- 91 Mental or emotional illness
- 92 Severe distortion of limbs and/or spine
- 93 Disfigurement of face, hands, or feet
- 94 Learning disability

**Completion Instructions**

- Handicap data is used to furnish statistical data on Federal employment within and outside of Department/agencies.
- Refer to OPM instructions for procedures to be used in collecting and reporting handicap status.

**Data Entry**

*Accession:* Required.

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* N/A

*Updating Action:* N/A

**Special Employment Programs Code** (*alphanumeric field; 2 positions*). Used to indicate the employee is in a special employment program.

**Completion Instructions**

☐ Enter one of the following codes:

**Code Definition**

<b>00</b>	Not applicable
<b>01-38</b>	Reserved
<b>39</b>	Apprentice Trainee Program
<b>41</b>	Schedule A 213.3102 (LL)
<b>42</b>	Schedule A 5 CFR 213.3102 (T)
<b>43</b>	Schedule A 5 CFR 213.3102 (U)
<b>44</b>	700-hour Trial, 5 CFR 316.402 (a)
<b>45</b>	Temp, 5 CFR 316.402 (b) (5)
<b>46</b>	Schedule B, 5 CFR 213.3202 (k)
<b>48</b>	National Scholars Program
<b>58</b>	Work Release Program
<b>59</b>	Veterans Readjustment Program
<b>60</b>	Appointment of Veterans (30% disabled) under 5 U.S.C. 3112
<b>65</b>	Workers Compensation Rehab/Rehire Program
<b>67</b>	Special Handicap Appointment under Schedule A 213.319(t) or (u) or Schedule B 213.3102(k)
<b>68</b>	700 hour handicap appointment
<b>69</b>	Presidential Management Intern Program (PMIP)
<b>76</b>	Upward mobility - assigned to same series
<b>77</b>	Upward mobility - assigned to different series
<b>80</b>	SES Candidate Development Program
<b>82</b>	Development SES Mobility Assignment
<b>90</b>	Long Term Training Over 120 Days - Competitive In-House
<b>91</b>	Secretaries and Department Heads
<b>93</b>	Long Term Training- Competitive in Agency or Department
<b>94</b>	Junior Technician Program
<b>95</b>	Com Sci Fellowship Program
<b>96</b>	Federal Executive Institute (FEI)

**Code Definition**

<b>97</b>	President's Executive Exchange Program
<b>9A</b>	Special Government Employee
<b>9B</b>	Displaced Employee
<b>9C</b>	Vocational Office
<b>9G</b>	Scientific Technician, Professional Aids
<b>9H</b>	Administrative Fellowship Program (NOAA)
<b>9I</b>	EEO Recognition
<b>9P</b>	Public Service Career (Entry)
<b>9Q</b>	Public Service Career (Upgrade)
<b>9S</b>	Meteorological Intern
<b>9T</b>	Science Intern
<b>9U</b>	Science Technician
<b>9V</b>	20/20 Work Study
<b>9W</b>	Graduate Scientist
<b>AD</b>	Asst Director 720 Hours Ceiling
<b>AM</b>	USAID Foreign Service Retirement (Plans D and F)
<b>AT</b>	Assistant United States trustee
<b>G4</b>	Accounting Fellow
<b>G5</b>	Outstanding Scholar
<b>G6</b>	Consultant under 31 USC 731 (E) (1)
<b>GR</b>	Retired Comptroller General (CG)
<b>GS</b>	Survivor Of Retired Comptroller General
<b>HT</b>	Housing Technician
<b>IJ</b>	Immigration Judge
<b>IP</b>	Intern Program
<b>MC</b>	Marshals Service Contractor
<b>NR</b>	NAFI Retirement Coverage
<b>OA</b>	DEA Agents hired under Sch. A (C) (1)
<b>OB</b>	DEA Agents (1811) hired under Sch. B
<b>OC</b>	USA/USM serving temporary court appointment
<b>OG</b>	Employee hired under Sch. A (G) - 40%/GS03/01
<b>OH</b>	Attorneys hired under agency's Honor Recruit Program

**Special Employment Programs Code**  
(cont'd)

<b>Code</b>	<b>Definition</b>
<b>OU</b>	Attorneys hired as Special Assistants to the agency
<b>PC</b>	Sch.C Position Excepted From Competitive Service
<b>PN</b>	GS 16 - 18 Formerly Reported Under Sch. C
<b>PZ</b>	Presidential Appointment By/With Senate Consent
<b>SB</b>	Jr., Prof. Staff Training Program
<b>SC</b>	Post Doctoral Research Program
<b>SH</b>	Summer Hires
<b>SL</b>	Summer Law Clerk
<b>SI</b>	Faculty Member of a College or University (213.3102(0))
<b>S2</b>	High School Teacher (213.3102(a))
<b>T2</b>	Trained Under Initial Procurement Contract
<b>TP</b>	United States Secret Service Uniformed Division Technician Pay

<b>Code</b>	<b>Definition</b>
<b>UT</b>	United States Trustee
<b>V8</b>	AmeriCorps Member

**Completion Instructions**

- Enter **00** if the employee is not under a special employment program at the time of hire, or if a personnel action is processed and the employee will no longer be in a special employment program.
- When the field is **9I** (secretaries and Department Heads), the Pay Plan must be **EX**.

**Data Entry**

*Accession:* Required.

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* N/A

*Updating Action:* Required if the personnel action is processed to change or correct this field.

**Special Employee Pay Code** (*numeric field; 2 positions*). Used to identify the employee as belonging to a special category of pay processing not accommodated in any other portion of the Payroll/Personnel System. Data in this block also assists agency personnel offices in the preparation of certain output listings and reports.

**Completion Instructions**

☐ Enter one of the following codes:

**Code Definition**

**00** Not applicable  
**01** Scheduled standby - nonexempt from FLSA  
**02** AUO - nonexempt from FLSA  
**03** Scheduled standby - AUO - exempt/nonexempt from FLSA  
**05** Presidential Appointee  
**07** Experts and Consultants  
**08** AUO other than law enforcement personnel  
**09** Mixed Tour (FEHB not prorated)  
**10** Other employees, spec. appr/PMB, exceed band by 6%  
**12** Supervisory/managerial employees, exceed band by 6%  
**14** Schedule C employee  
**15** NOAA Field Parties  
**16** ZP Division Chiefs, supervisory differential 6% NTE range 5  
**17** Supervisory/managerial, other employees, spec. appr/PMB, 3% differential  
**18** Supervisory/managerial, other employees, spec. appr/PMB 6% differential  
**19** ZP Supervisory/managerial, other than Division Chiefs, 3% differential  
**20** ZA Division Chiefs, exceed maximum rate by 6%  
**23** Forest Service Job Corps  
**24** Panamanian National  
**25** FS Job Corps MT (FEHB not prorated)  
**26** Availability Pay  
**29** Employed on U.S. Saudi Arabian Joint Commission on Economic Cooperation  
**30** Overseas employee not payrolled by NFC  
**32** Law Enforcement - Ineligible for AUO  
**33** Non-wage grade employee exempt from the earnings limitation in Reg. 550.105

**Code Definition**  
**34** Travel Reimbursement  
**35** Manually paid employee  
**36** Manually paid employee paid on a semi-monthly basis  
**37** Employee Paid 8% Hazard Duty (Land Based Work Above 3900 Meters)  
**39** Office of Technology Assessment (OTA) Board Member Staff  
**40** Overseas employee payrolled by NFC  
**44** Other NFP - Title II and Title IV dollars (Agency 11 only)  
**45** Forest Service YCC enrollee  
**46** Older American  
**47** Hires into MEL positions tracked in the NFMAS database (Agency 11 only)  
**48** Hires into the 500 developmental positions (Agency 11 only)  
**49** Alaska local hire program  
**52** Semi-monthly Coop  
**53** Paid under 2/3 rule  
**54** Without compensation employee paid for holidays and overtime  
**55** Surface Mining Control/Reclamation Act of 1977  
**56** Federal Summer Intern  
**58** Work Release Program  
**59** Veteran's Readjustment  
**60** Entry Level Auditors - Rapid Promotion Plan  
**61** FCA Employee - No Differential  
**62** Non-resident alien (F-1, J-1, M-1 visa's)  
**64** Trainee's for higher positions  
**81** Mixed Tour Employee  
**82** Employee Appt Less Than 90 Days  
**89** Council Member  
**90** Disaster Area Cadre Employee  
**91** Disaster Temporary Employee  
**99** Library of Congress - Register of Copyrights

### Additional Information

- ❑ Enter **00** if: (1) the employee does not belong to a special pay category that requires special processing, or (2) the employee will no longer be in a special pay category.
- ❑ The pay plan cannot be ES when this field is **01-03** or **08**.
- ❑ The pay plan cannot be ES when this field is **01-03** or **08**.
- ❑ The pay plan must be **AD, EH, EI, EX, FE, FO, GS** (Grade 16-18) or **SR** when this field is **05**.
- ❑ Transaction Code 17, Prefix 50, Travel Reimbursement, must be recorded on the Time and Attendance Report (T&A), to record the amount of travel reimbursement when this field is **34**. For detailed information, see the T&A procedure.

- ❑ A split T&A may be required if the effective date of the personnel action, which is correcting or changing this field, is other than the first Sunday of the processing pay period. For detailed information, see the T&A procedure.

### Data Entry

*Accession:* Required

*Official Change:* Required if the official change action (e.g. Conversion to Career) causes the special pay category to change.

*Separation:* N/A

*Updating Action:* Required if the personnel action is processed to change or correct this field.

---

**Coop Share Amt** (*numeric field; 7 positions*). Used to identify that portion of an employee's salary which is being paid by a non-Federal organization.

---

### Completion Instructions

- Complete this field if the employee is a cooperative type employee and the cooperator is paying a portion of the salary.
- Enter the amount of the cooperative type employee's salary which is being paid by the cooperator. The first five digits are whole dollars and the last two digits are cents.

### Additional Information

- If the employee is a cooperative type employee, the Salary Share Code field must also be **1, 2, 4, or 5**.
- The Payroll/Personnel System will automatically reduce the amount of the Base (scheduled) Salary field

by the amount entered in this field and compute the amount to be paid.

- An employee whose salary is paid entirely by a source other than the agency, or whose salary is insufficient to meet the deductions for personal benefits, is paid manually.

### Data Entry

*Accession:* Required if the Salary Share Code field is **1, 2, 4, or 5**.

*Official Change:* Required if the official change action is changing the salary share code to **1, 2, 4, or 5**.

*Separation:* N/A

*Updating Action:* Required if the personnel action is processed to change or correct this field.

---

**Annuitant Share Amt** (*numeric field; max. of 7 positions*). Used to identify the portion of an employee's salary which is being paid by the Civil Service Retirement fund or the Federal Employee Retirement System fund.

---

### Completion Instructions

- Complete this field only if the employee is a reemployed annuitant. Enter the annual amount of annuity the employee is receiving under the Civil Service Retirement or Federal Employee Retirement System.
- The first five digits are whole dollars and the last two digits are cents.
- The Payroll/Personnel System will automatically reduce the amount of the Base (scheduled) Salary field by the amount entered in this field and compute the amount to be paid by the agency.

- If the employee is a reemployed annuitant, the Salary Share Code field must be **3, 4, or 5**.

### Data Entry

*Accession:* Required if the Salary Share Code field is **3, 4, or 5**.

*Official Change:* Required if the official change action is changing the Salary Share Code field to **3, 4, or 5**.

*Separation:* N/A

*Updating Action:* Required if the personnel action is processed to change or correct this field.

---

**Salary Share Code** (*numeric field; 1 position*). Used to identify the source which shares with the agency in paying the employee's salary.

---

**Completion Instructions**

Enter one of the following codes:

**Code Definition**

- 0** Not applicable
- 1** State co-operator
- 2** Other type of co-operator
- 3** Annuitant under CSRS or FERS
- 4** Annuitant and state co-operator
- 5** Annuitant and other type co-operator

**Additional Information**

Enter **0** if the employee is not a cooperative type employee or receiving an annuity under CSRS or FERS, or is not a combination of both.

If the Salary Share Code is **3, 4, or 5**, the Annuitant Indicator field must be **1, 4, 5, or A-F**.

If the Salary Share Code is **3**, the Coop Share Amt field and the Coop Overtime Rate field must be blank.

**Data Entry**

*Accession:* Required

*Official Change:* N/A

*Separation:* N/A

*Updating Action:* Required if the personnel action is processed to change or correct this field.

---

**Coop Overtime Rate** (*numeric field; 4 positions*). Used to identify the hourly overtime rate for a cooperative type employee when the overtime rate is not based on the employee's base (scheduled) salary because the cooperator pays some of the overtime.

---

#### Completion Instructions

- Enter the hourly overtime rate to be paid by the Department/agency when overtime payments are to be shared with the cooperator.
- The first two digits are whole dollars and the last two digits are cents.

#### Additional Information

- Do not complete this field if the agency has agreed to pay for all overtime worked.
- If an amount is entered in this field, the Salary Share Code field must be *1, 2, 4, or 5*.
- A split Time and Attendance Report (T&A) may be required if the effective date of the personnel action, which is changing or correcting this field, is other than the first Sunday of the processing pay period. For

detailed information on split T&A's, see the T&A procedure.

- Enter four zeros in this field to remove the overtime rate.

#### Data Entry

*Accession:* Required if the employee is a cooperative employee.

*Official Change:* Required if the NOAC on the processing personnel action indicates that the employee remains a cooperative type employee but removes the overtime rate.

*Separation:* N/A

*Updating Action:* Required if the personnel action is processed to change or correct this field.

---

**Coop Holiday Rate** (*numeric field; 4 positions*). Used to identify the hourly holiday rate for a cooperative type employee when the holiday rate is not based on the employee's base (scheduled) salary because the cooperator pays part of this rate.

---

#### Completion Instructions

- Enter the hourly holiday rate to be paid by the department/agency when overtime payments are to be shared with the cooperator.
- The first two digits are whole dollars and the last two digits are cents.

#### Additional Information

- Do not complete this field if the agency has agreed to pay for all holidays worked.
- If an amount is entered in this field, the Salary Share Code field must be **1, 2, 4, or 5**.
- A split Time and Attendance Report (T&A) may be required if the effective date of the personnel action, which is changing or correcting this field, is other than the first Sunday of the processing pay period. For

detailed information on split T&A's, see the T&A procedure.

- Enter four zeros in this field to remove the holiday rate.

#### Data Entry

*Accession:* Required if the employee is a cooperative employee.

*Official Change:* Required if the NOAC on the processing personnel action indicates that the employee remains a cooperative type employee but removes the holiday rate.

*Separation:* N/A

*Updating Action:* Required if the personnel action is processed to change or correct this field.

---

**Quarters Deduction Amount** (*numeric field; max. of 5 positions*). Used to identify the amount to be deducted per day or per pay period from the salary of an employee who is being furnished quarters, utilities, etc. (“in kind” allowances).

---

#### Completion Instructions

- Enter the per day or pay period amount to be deducted for quarters. The first three digits are whole dollars and the last two digits are cents.
- The amount entered in this field must be compatible with the code entered in the Quarters Deduction Code field (e.g., if the Quarters Deduction Code is 1, per day deduction - tax exempt, the amount in this field must be a daily amount).

#### Additional Information

- The amount entered in this field is designated for quarters deductions only. If the employee is eligible for quarters allowances, enter the appropriate data in PRES Document Type 127, Allowances. For detailed information, see Allowances in the PRES procedure.
- A split Time and Attendance Report (T&A) may be required if the effective date of the personnel action,

which is changing or correcting this field, is other than the first Sunday of the processing pay period. For detailed information on split T&A’s, see the T&A procedure.

- Enter five zeros in this field to remove the quarters deduction amount.

#### Data Entry

*Accession:* Required if the employee is subject to quarters deductions.

*Official Change:* Required if the NOAC on the processing personnel action indicates that the employee is no longer subject to quarters deductions or is now subject to the deductions.

*Separation:* N/A

*Updating Action:* N/A

---

**Quarters Deduction Code** (*numeric field; 1 position*). Used to identify whether the quarters deduction amount is to be a taxable/exempt per day or pay period deduction.

---

### Completion Instructions

- Enter one of the following codes:

Code	Definition
1	Per day deduction - tax exempt
2	Per day deduction - not tax exempt
3	Per pay period deduction - tax exempt
4	Per pay period deduction - not tax exempt

Code	Definition
1	Per day deduction - tax exempt
2	Per day deduction - not tax exempt
3	Per pay period deduction - tax exempt
4	Per pay period deduction - not tax exempt

- The code entered in this field must be compatible with the amount entered in the Quarters Deduction Amount field (e.g., if the Quarters Deduction Amount is a per day deduction amount, the code in this field must be 1 or 2).

### Additional Information

- The code entered in this field is designated for quarters deductions only. If the employee is eligible for quarters allowances, enter the appropriate data in PRES

Document Type 127, Allowances. For detailed information, see Allowances in the PRES procedure.

- A split Time and Attendance Report (T&A) may be required if the effective date of the personnel action, which is changing or correcting this field, is other than the first Sunday of the processing pay period. For detailed information on split T&A's, see the T&A procedure.

- Enter a zero in this field to remove the quarters deduction amount.

### Data Entry

*Accession:* Required if the employee is subject to quarters deductions.

*Official Change:* Required if the NOAC on the processing personnel action indicates that the employee is no longer subject to quarters deductions or is now subject to the deductions.

*Separation:* N/A

*Updating Action:* N/A

---

**COLA/Post Differential Code** (*numeric field; 1 position*). Used to identify whether the employee is entitled to receive a cost of living allowance (COLA) and/or a post differential, in addition to the base (scheduled) salary.

---

COLA is a special pay entitlement for an employee in a high cost of living area. Non-foreign post differential is a special pay entitlement for an employee whose duty station is in a non-foreign area. Foreign post differential is a special pay entitlement for an employee whose duty station is in a foreign area.

Non-foreign COLA or post differential and foreign post differential are considered pay which an employee receives in addition to the base (scheduled) salary. It is not included in the base (scheduled) salary. Payments for both non-foreign and foreign differential are included in gross income for Federal income tax purposes. Payment for COLA is not included in gross income for Federal income tax purposes.

### Completion Instructions

- Enter one of the following codes:

Code	Definition
0	None
2	Non-Foreign Post Differential
3	COLA - Local Retail with Post Differential
4	Foreign Post Differential
5	COLA - Local Retail
6	COLA - Commissary/PX with Post Differential
7	COLA - Commissary/PX

**Note:** Federal Wage System (FWS) employees are not entitled to COLA or post differential in non-foreign areas. For foreign areas, the Department of State's Standardized Regulations (Government civilians, foreign areas) establishes regulations and post classifications for the payment of foreign post differential. Actual payment of COLA or foreign differential for FWS employees is based upon information recorded on the employee's T&A.

### Additional Information

- Enter 0 if the employee's duty station:
  - is not within one of the designated non-foreign or foreign areas for which a post differential has been established, thus automatically excluding the employee from these payments.

- is within one of the designated non-foreign or foreign areas for which a post differential has been established, but the employee will not be eligible to receive payments because of a disqualifying factor.

- Enter 2 if the employee's duty station is in one of the following non-foreign areas for which a post differential has been established, and the employee is eligible to receive non-foreign post differential:

- AQ** - American Samoa
- CQ** - Northern Mariana Islands
- GQ** - Guam
- JQ** - Johnston Atoll
- MQ** - Midway Islands
- WQ** - Wake Island

Transaction Codes (TC) 46 (start post differential) and TC 48 (stop post differential) must be recorded on the employee's T&A to begin and discontinue the actual payment of non-foreign post differential. For information on TC 46 and TC 48, see the T&A Procedure.

- Enter 3 if the employee's duty station is in a non-foreign area for which both COLA and a post differential rate have been established, and the employee is eligible to receive both non-foreign COLA and post differential.

TC 45 (start cost of living allowance) and TC 46 (start post differential) must both be recorded on the employee's T&A to begin actual payment of both non-foreign COLA and post differential. TC 47 (stop cost of living allowance) and TC 48 (stop post differential) must both be recorded on the employee's T&A to discontinue payment of non-foreign COLA and post differential. For information on TC 45-48, see the T&A procedure.

- Enter 4 if the employee's duty station is in a foreign area classified for payment of a foreign post differential and the employee is entitled to receive foreign post differential only.

TC 46 (start post differential) and TC 48 (stop post differential) must be recorded on the employee's T&A to begin and discontinue actual payment of foreign post differential. For information on TC 46 and TC 48, see the T&A procedure.

**COLA/Post Differential Code** (cont'd)

□ Enter *5* or *7* if the employee's duty station is in one of the following non-foreign areas and the employee is eligible to receive non-foreign COLA only:

*02* - Alaska

*15* - Hawaii

*CQ* - Northern Mariana Islands

*GQ* - Guam

*RQ* - Puerto Rico

*VQ* - Virgin Islands (St. Croix, St. Thomas, and St. John only)

TC 45 and TC 47 must be recorded on the employee's T&A to begin and discontinue actual payment of non-foreign COLA. For information on TC 45 and TC 47, see the T&A procedure.

**Data Entry**

*Accession:* Required

*Official Change:* Required if the official change action is changing the duty station and the employee will be eligible for foreign COLA and/or foreign post differential or non-foreign COLA and/or non-foreign post differential.

*Separation:* N/A

*Updating Action:* Required if the personnel action is processed to correct this field.

---

**Uniform Service Component** (*numeric field; 1 position*). Used to identify the employee's current military status.

---

**Completion Instructions**

Enter one of the following codes:

**Code Definition**

<i>0</i>	None
<i>1</i>	Ready Reserve
<i>2</i>	Standby Reserve
<i>3</i>	National Guard
<i>4</i>	Retired Military - Regular
<i>5</i>	Retired Military - Non regular

**Additional Information**

If the Uniform Service Component is 4 or 5, the Date Retired Military Service field must be completed.

**Data Entry**

*Accession:* Required

*Official Change:* N/A

*Separation:* N/A

*Updating Action:* Required if the personnel action is processed to change or correct this field.

---

**Frozen Service** (*numeric field; 4 positions*). Used to identify the total years and months of civilian and military service, creditable for calculation of the SCD for Leave, at the time the employee first becomes covered by FICA and CSRS (retirement coverage codes C and E) or by FERS and FICA (retirement coverage codes K, L, M, or N).

---

#### Completion Instructions

- ❑ Enter the total amount of years and months. The first two digits represent the years and the last two digits represent the months. For example, five years and three months would be entered as **0503**.
- ❑ When an amount (other than four zeros) is entered in this field, the Retirement Coverage field must be completed and must be other than 4 or 5.

#### Data Entry

*Accession:* Required if, at the time of hire, the employee first becomes covered by FICA and CSRS (retirement coverage codes C and E) or by FERS and FICA (retirement coverage codes K, L, M, or N) and has civilian and military service creditable for calculation of the SCD for Leave.

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* N/A

*Updating Action:* N/A

---

**Prev Ret Coverage** (*alpha field; 1 position*). Used to identify whether an employee has, at the time of the most recent appointment to Federal service, previously been covered by the Civil Service Retirement System (CSRS) or the Federal Employees' Retirement System (FERS).

---

**Completion Instructions**

Enter one of the following codes:

**Code Definition**

- N* Never covered - Employee has never been covered by CSRS or FERS.
- P* Previously covered - Employee was previously covered by CSRS or FERS (regardless of whether or not the employee withdrew previously contributed funds).

*R* Refund eligible - Employee was previously covered by CSRS and is eligible for a refund.

**Data Entry**

*Accession:* Required

*Official Change:* Required if the NOAC on the processing personnel action is converting the employee from CSRS or FICA and CSRS to FERS.

*Separation:* N/A

*Updating Action:* N/A

---

**Creditable Military Service** (*numeric field; 4 positions*). Used to identify the total number of years and months of military service creditable for leave accrual purposes.

---

**Completion Instructions**

Enter the total amount of years and months. The first two digits represent the years and the last two digits represent the months. For example, five years and three months would be entered as **0503**.

**Additional Information**

If the employee has creditable military service, the Veterans Preference must indicate that the employee is a veteran.

**Data Entry**

*Accession:* Required if the employee is a veteran. Do not complete this field for reemployed annuitants.

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* N/A

*Updating Action:* N/A

---

**Date Retired Military Service** (*numeric field; 6 positions*). Used to identify the date an employee retired from the military.

---

**Completion Instructions**

- Enter the date retired military service as 6 numeric characters in month, day, and year order (e.g., **060994**). Do not enter any punctuation.
- This date cannot be later than the effective date of the processing personnel action.

**Additional Information**

- This field must be completed if the Annuitant Indicator field is **4, 5, C, D, E, or F**.
- If the employee has creditable military service, the Veterans Preference must indicate that the employee is a veteran.

- This field must also be completed if the Uniform Service Component field is 4 or 5.

**Data Entry**

*Accession:* Required if the employee retired from military service.

*Official Change:* N/A

*Separation:* N/A

*Updating Action:* Required if the personnel action is processed to change or correct this field.

---

**SCD-Retirement** (*numeric field; 6 positions*). Used to identify the date when service creditable for retirement purposes began.

---

### Completion Instructions

- Enter the SCD-Retirement date as 6 numeric characters in month, day, and year order (e.g., **060994**). Do not enter any punctuation.
- This date cannot be later than the effective date of the processing personnel action.
- Complete this field when the employee is eligible for retirement coverage and this date is different than the SCD for Leave.
- If this field is left blank, the effective date of the processing personnel action will be generated if the nature of action code is:

**100** - Career Appt

**101** - Career Cond Appt

**102** - Career Exec Assign

**103** - Career Cond Exec Assign

**104** - Non-Career Exec Assign

**140** - Reins - Career Appt

**141** - Reins - Career Cond Appt

**170** - Excepted Appt

### Additional Information

- This date must be present if the Retirement Coverage Code field is **I, 3, 6, 7, C, D, E, G, I, K, M, P, R, T,** or **W**.
- This date is not required if the Retirement Coverage field is **2, 4, 5, J,** or **X**.

### Data Entry

**Accession:** Required if the employee is eligible for retirement coverage and the SCD retirement is different than the SCD leave.

**Official Change:** Required if the official change action is processed to initially furnish this date.

**Separation:** N/A

**Updating Action:** Required if the personnel action is processed to change or correct this field.

---

**Date Last Entered Present Grade** (*numeric field; 6 positions*). Used to identify the date when the employee was most recently assigned to a current grade.

---

**Completion Instructions**

- Enter the date last entered present grade as 6 numeric characters in month, day, and year order (e.g., **060994**). Do not enter any punctuation.
- This date cannot be later than the effective date of the processing personnel action.

**Additional Information**

- This date must be present if the processing personnel action is changing the employee's grade.

**Data Entry**

*Accession:* Required

*Official Change:* Required if the official change action is changing the grade or correcting this field.

*Separation:* N/A

*Updating Action:* N/A

---

**Agency Use (Accessions/Official Changes)** (*alphanumeric field; max. of 12 positions*). Used to identify specific data identified by individual agency requirements.

---

**Data Entry**

*Accession:* Refer to your agency personnel office for instructions on completing this field.

*Official Change:* Required if the official change action is changing this field.

*Separation:* Required for specific NOACs. See the miscellaneous data elements in this chapter for additional information.

*Updating Action:* N/A

---

**Authority Alpha and Remarks**

---

See the [Remarks and Status Fields](#) section in this chapter for completion and entry instructions for these fields.

System Retired  
Reference Only

The following completion instructions are for the data elements displayed in PACT for personnel actions other than accessions; however, some of the data elements (i.e., authority alpha) may also apply to accession personnel actions. The data elements in this section are

listed in alphabetical order, and an explanation of each data element is provided and whether entry of the data element is required for an (1) Accession, (2) Official Change, (3) Separation or, (4) if the data can be updated or corrected on an unofficial action.

System Reference Only

---

**Accounting Code** (*alphanumeric field; max. of 27 positions*). Used to record the accounting data that will be charged for payment of an award or separation incentive.

---

### Completion Instructions

- Enter the accounting code of the agency fiscal office or specific organization that will pay for the cash award or separation incentive if the Payroll/Personnel System generates the award or separation incentive payment.
- If this field is not completed, the Payroll/Personnel System will generate the accounting data that is stored on the employee's database salary year-to-date data record (IRIS Program 103) on the PACT screen.
- This field must be completed if:
  - the employee's database salary year-to-date data record (IRIS Program 103) has no stored accounting data.
  - the accounting stored on the employee's database year-to-date salary data record (IRIS Program 101) is not to be used.
  - the employee's award is being funded by a different agency or accounting station.

- If no accounting is stored on IRIS Program 103 for the employee, a message will be displayed on the PACT screen.

- If more than one Department is paying for the award:
  - Leave this field blank to generate stored accounting data from the employee's database, or
  - Complete this field if no accounting data is stored in the employee's database.

Then submit proper documentation to the appropriate Departments for manual reimbursement of the award costs.

### Data Entry

*Accession:* N/A

*Official Change:* Required if the processing personnel action is for an award or separation incentive and the Payroll/Personnel System generates the award or separation incentive payment.

*Separation:* N/A

*Updating Action:* N/A

---

**Accounting Station Charged** (*numeric field; 4 positions*). Used to record the accounting station that will be charged for payment when the employing agency is not issuing the award.

---

**Completion Instructions**

Enter the accounting station code only if: (1) the Payroll/Personnel System will generate the award payment and (2) the agency paying for the award is not the employing agency.

**Data Entry**

*Accession:* N/A

*Official Change:* Required if the processing personnel action is for an award and the Payroll/Personnel System will generate payment of the award.

*Separation:* N/A

*Updating Action:* N/A

---

**Address Indicator** (*numeric field; 1 position*). Used to indicate the mailing address for an award payment or separation incentive.

---

### Completion Instructions

☐ Enter one of the following address indicator codes if the Payroll/Personnel System will generate the award payment or separation incentive:

#### Code Definition

- |   |  |
|---|--|
| 1 | POI (the employing office address recorded in TMGT)                    |
| 2 | Check Mail Address (the same address where the salary check is mailed) |
| 3 | Specified Address  |
| 4 | Designated Agent   |

If Code 3 or 4 is entered in this field and the Specification of Check Mailing Address screen is displayed, complete the fields described below:

#### For Code 3:

- 1. First Line Street Address** (*25-positions maximum*). Enter the first line of the street address.
- 2. Second Line Street Address** (*25-positions maximum*). Enter the second line of the street address.
- 3. City Name** (*20-positions maximum*). Enter the city name.

**4. State Name** (*2-positions*). Enter the state abbreviation.

**5. ZIP Code** (*9-positions maximum*). Enter the ZIP Code.

#### For Code 4:

**6. Designated Agent.** Enter the four-digit designated agent code.

**Note:** If the award check is being mailed to the agency office for presentation to the employee, include a coordinator's name, in parentheses, in the first or second line address field to ensure that the check will not inadvertently be given to the employee.

#### Data Entry

*Accession:* N/A

*Official Change:* Required if the processing personnel action is for an award or separation incentive and the Payroll/Personnel System will generate the payment.

*Separation:* N/A

*Updating Action:* N/A

---

**Agency Charged** (*alphanumeric field; 2 positions*). Used to indicate the agency code when an agency other than the employing agency is issuing the award.

---

**Completion Instructions**

Enter the two-character code if: (1) the Payroll/Personnel System will generate the award payment and (2) the agency paying for the award is not the employing agency.

**Data Entry**

*Accession:* N/A

*Official Change:* Required if the processing personnel action is for an award and the Payroll/Personnel System will generate the award payment.

*Separation:* N/A

*Updating Action:* N/A

---

**Agency Use (Separations)** (*alphanumeric field; max. of 12 positions*). Used to identify and document eight critical retirement data elements in order to expedite processing of retirement actions. Refer to the completion instructions listed below for data entry requirements for each data element.

---

### Completion Instructions

This field must be completed for the following separation nature of action codes:

- 300 - Retirement Mandatory
- 301 - Retirement Disability
- 302 - Retirement Voluntary
- 303 - Retirement Special Option
- 304 - Retirement ILIA
- 312 - Resignation ILIA
- 350 - Death
- 356 - Termination Involuntary
- 976 - Preliminary Retirement

The eight critical retirement data elements, with the form numbers on which the information is located, and data entry instructions are listed below:

**1st Position - Refund of Retirement Deductions Received (SF-2801/SF-3107)** (*required, alpha field; 1 position*). Key in *Y* (yes), *N* (no), or *U* (unknown) to indicate if the employee previously received a retirement refund.

**2nd Position - Military Retired Pay Recipient (SF-2801/SF-3107)** (*required, alpha field; 1 position*). Key in *Y* (yes), *N* (no), or *U* (unknown) to indicate if the employee is receiving retirement checks based on military service.

**3rd Position - Military Waiver Received (SF-2801/SF-3107)** (*required, alpha field; 1 position*). Key in *Y* (yes), *N* (no), or *U* (unknown) to indicate if a military waiver was received declining military pay. If the employee is not a retired military recipient, key in *N*.

**4th Position - Survivor Election (SF-2801/ SF-3107)** (*required, alpha field; 1 position*). Key in *Y* (yes) or *N* (no) to indicate if the employee elected the survivor option.

**5th Position - Post-1956 Military Deposit Paid (SF-2801/SF-3107)** (*required, alpha field; 1 position*). Key in *Y* (yes/not applicable) or *N* (no) to indicate if the employee paid Post-1956 military deposit. If the employee does not have military service, key in *Y*.

**6th Position - Part-Time After April 7, 1986 (SF-2801-1/SF-3107-1)** (*required, alpha field; 1 position*). Key in *Y* (yes) or *N* (no) to indicate if the employee has any part-time service after April 7, 1986.

**7th Position - Administrative Fee** (*required, alpha field; 1 position*). Key in *Y* (yes) or *N* (no) to indicate if the agency has to pay OPM a 9-percent or 15-percent administrative fee.

**8th Position - Life Insurance Reduction (SF-2818)** (*required, alpha field; 1 position*). Key in the value to indicate if the employee is selecting a reduction in life insurance. Valid values are *0* (no life insurance), *1* (75 percent reduction), *2* (50 percent reduction), and *3* (no reduction).

**9th Position. FERS Disability Applicant - Applied For SSA Benefits** (*required, alpha field; 1 position*). Key in the value to indicate if a FERS employee applying for disability retirement has also applied for their social security benefits. Valid values are *Y* (yes) and *N* (no). If an employee is applying for CSRS retirement, key in *N*.

### Data Entry

*Accession:* N/A

*Official Change:* Required if the official change action is changing the grade or correcting this field.

*Separation:* Required if the nature of action code is one of the codes listed above.

*Updating Action:* N/A

---

**Amount of Award** (*numeric field; max. of 7 positions*). Used to record the monetary amount of an award or separation incentive.

---

**Completion Instructions**

Enter the total amount of money approved for the award or separation incentive. Leading zeros need not be entered.

**Data Entry**

*Accession: N/A*

*Official Change:* Required if the processing personnel action is for an award or separation incentive.

*Separation: N/A*

*Updating Action: N/A*

---

**Authority Alpha** (*alphanumeric field; max. of 20 positions*). Used to record the description of the law, executive order, regulation, rule, or other basis that authorizes the appointing official to effect the personnel action.

---

#### Completion Instructions

Enter the description of the authority whenever the authority must be cited and the field is present on the PACT screen. The type of description required is generated on the PACT screen and displayed directly above the Authority Alpha field, e.g., Agency Regulation for Termination Based on Performance, OPM Authority, CS Certification Number, etc. Refer to OPM instructions for additional information

#### Additional Information

Abbreviations (e.g., CS Cert No.30-1, etc.) may be used since a space, punctuation mark, or other symbol is counted as a character.

The literal description will be system generated for all authority codes that do not require the authority to be cited.

#### Data Entry

*Accession:* Required if the literal description of the authority must be cited.

*Official Change:* Required if the literal description of the authority must be cited.

*Separation:* Required if the literal description of the authority must be cited.

*Updating Action:* N/A

---

**Award Code** (*alphanumeric field; 4 positions*). Used to record the type of cash award or separation incentive paid to an employee.

---

**Completion Instructions**

- Enter the four-digit award code.
- To view valid award codes, see TMGT Table 043, Award Type Code.
- The award code entered in this field generates Remarks Code **499** followed by a description of the award on the SF-50-B.
- Award Code **C024** (Spot Cash Award) must be entered if the processing personnel action is a spot award.

- Enter code **C999** (Cash Award) if no type of award code is appropriate.

**Data Entry**

*Accession:* N/A

*Official Change:* Required if the processing personnel action is for an award or separation incentive.

*Separation:* N/A

*Updating Action:* N/A

---

**Bonus Amount** (*numeric field; max. of 8 positions*). Used to record the amount of a (1) recruitment bonus, which cannot exceed 25 percent of an employee's base (scheduled) salary, or (2) relocation bonus, which cannot exceed the greater of \$15,000.00 or 25 percent of an employee's base (scheduled) salary.

---

**Completion Instructions**

Enter the amount of money approved for the recruitment or relocation bonus. Leading zeros need not be entered, i.e., \$14,750.00 would be entered as **1475000**.

**Data Entry**

*Accession:* N/A

*Official Change:* Required if the processing personnel action is for a relocation or recruitment bonus.

*Separation:* N/A

*Updating Action:* N/A

---

**Case Number** (*alphanumeric field; max. of 8 positions*). Used to record the cash award case number assigned by the agency.

---

**Completion Instructions**

- Enter the eight-digit case number code.
  
- If the award is a group award, enter the same case number on each individual cash award document.

**Data Entry**

*Accession:* N/A

*Official Change:* Required if the processing personnel action is a cash award.

*Separation:* N/A

*Updating Action:* N/A

---

**Classification Action Code** (*numeric field; 1 position*). Used to indicate the disposition of the Individual Position in PMSO.

---

### Completion Instructions

☐ Enter one of the following codes:

Code	Definition
------	------------

0	Leave the employee's former position vacant and active.
---	---

1	Abolish the employee's former position.
---	---

2	Inactivate the employee's former position.
---	--

☐ The code entered in this field will remove the employee from the Individual Position and set the status of the position in PMSO after the employee is removed.

### Additional Information

☐ The entry of the classification action code in PACT is the only time both PMSO and personnel data can be processed simultaneously. All other changes to the individual position must be performed in PMSO.

☐ When an employee is reassigned (1) from one agency to another or (2) to another personnel office within the same agency, the losing office should advise the gaining office of the action to be taken with the employee's former position, i.e., abolish, inactivate, etc.

☐ If a cancellation of a previous position change is processed, a vacant and active individual position number must exist in PMSO. It may be necessary to establish a temporary individual position if the employee's former position is no longer vacant or was abolished.

☐ If a temporary position is established to process a cancellation, enter the classification action code as follows:

- on the cancellation, enter **0** to remove the employee from the current position and leave that position vacant and active

- on the restored action, enter **1** to remove the employee from the temporary position and abolish the temporary position.

### Data Entry

*Accession:* N/A

*Official Change:* Required if this field is present on the PACT screen.

*Separation:* Required

*Updating Action:* N/A

---

**Generate Payment (0=Yes 1=No)** (*numeric field; 1 position*). Used to indicate whether or not an award or separation incentive will be generated by the Payroll/Personnel System.

---

**Completion Instructions**

Enter one of the following codes:

**Code Definition**

*0* Yes

*1* No (denotes that the award or separation incentive is being processed for documentation purposes only. No payment is generated if *1* is entered).

**Note:** This code does not apply to spot awards. See the Generate Payment (Update Year To Date Only) field for

processing instructions if the processing personnel action is a spot award.

**Data Entry**

*Accession:* N/A

*Official Change:* Required if the processing personnel action is a cash award or separation incentive.

*Separation:* N/A

*Updating Action:* N/A

---

**Generate Payment (Update Year To Date Only 0=Yes 1=No)** (*numeric field; 1 positions*). Used when processing a spot award to indicate if the Payroll/Personnel System will (1) generate an SF-50-B or (2) generate the SF-50-B and include the amount of the spot award in the employee's year-to-date gross wages (e.g., W-2, Wage and Tax Statement and Form AD-334, Statement of Earnings and Leave).

---

**Completion Instructions**

Enter one of the following codes:

**Code Definition**

*0* Yes

*1* No

**Note:** This field applies only to spot awards. See the Generate Payment (*0=Yes 1=No*) field if the processing personnel action is not a spot award.

Enter Code *0* to indicate that the Payroll/Personnel System should generate an SF-50-B and include the amount of the spot award in the employee's year-to-date gross wages (e.g., W-2, Wage and Tax Statement, and Form AD-334, Statement of Earnings and Leave).

Enter Code *1* to indicate that the Payroll/Personnel System should generate the SF-50-B. The amount of the spot award will not be included in year-to-date gross wages, W-2, and AD-334.

**Data Entry**

*Accession:* N/A

*Official Change:* Required if the processing personnel action is a cash award.

*Separation:* N/A

*Updating Action:* N/A

---

**Grade Retention Expiration Date** (*numeric field; 6 positions*). Used to identify the expiration date of an employee's entitlement to grade retention.

---

#### Completion Instructions

Enter the expiration of grade retention date as 6 numeric characters in month, day, and year order (e.g., **060994**). Do not enter any punctuation. Complete this field if the Pay Rate Determinant Code field is **A, B, E, F, U, or V**.

#### Additional Information

- Enter six zeros to remove or cancel this date when the date is in error or the employee becomes eligible for pay retention.
- This date is recorded in the employee's database retained grade data record (IRIS Program 128), which displays data for the position the employee occupies.

IRIS Program 101 displays position information for the position the employee is retaining or formerly occupied.

If the employee is downgraded with an entitlement to another period of grade retention, enter the current pay rate determinant code and the date of the original grade retention period.

#### Data Entry

*Accession:* N/A

*Official Change:* Required if this field is present on the PACT screen and the employee is entitled to grade retention.

*Separation:* N/A

*Updating Action:* N/A

---

**Intangible Benefits (1=Yes or Space)** (*numeric field; 1 position*). Used to indicate if the value of the award is based on intangible benefits.

---

**Completion Instructions**

- Enter **1** in this field if the value of the award is based on intangible benefits.
  
- Leave this field blank if the value of the cash award is based on tangible benefits.

**Data Entry**

*Accession:* N/A

*Official Change:* Required if the processing personnel action is a cash award, and the value of the award is based on intangible benefits.

*Separation:* N/A

*Updating Action:* N/A

---

**Last Date In Pay Status** (*numeric field; 6 positions*). Used to identify the final date in pay status for an employee who is retiring or who is deceased.

---

**Completion Instructions**

Enter the last date in pay status as 6 numeric characters in month, day, and year order (e.g., **060994**). Do not enter any punctuation.

**Additional Information**

- For a preliminary disability action, enter the projected final date the employee will be in a pay status.
- If the employee is currently on annual leave and has no sick leave, enter the date to which the annual leave extends.
- If the employee is on annual leave and also has sick leave available, confer with the employee to determine

if the employee wishes to be placed on sick leave or remain on annual leave.

The projected date for either situation will be the date on which the leave or pay ends.

**Data Entry**

*Accession:* N/A

*Official Change:* N/A

*Separation:* Required if the NOAC on the processing personnel action indicates a retirement or death action.

*Updating Action:* N/A

---

**LI Coverage Amount** (*numeric field; 4 positions*). Used to record the amount of basic insurance coverage for an employee who is covered under the Federal Employees Group Life Insurance (FEGLI) plan. The amount recorded in this field does not include additional optional insurance coverage amount.

---

### Completion Instructions

Complete this field if:

- the employee is eligible and has not waived basic FEGLI coverage, and
- the employee works (1) at such different rates of pay that the Payroll/Personnel System is unable to calculate or project the rates of pay on an annual basis (i.e., different tours of duty during the year, (2) is paid on a piecework basis, or (3) when an employee will be paid at different rates of pay during the year.

Determine the employee's projected annual salary. If the amount is less than \$8,000, the amount of basic life insurance will be \$10,000.

If the projected salary is more than \$8,000, round the amount to the next \$1,000 and add \$2,000 to determine

the FEGLI amount. For example, the employee's projected annual salary will be \$8,500; round this figure to \$9,000 and add \$2,000. The amount of basic FEGLI coverage will be \$11,000.

Enter the amount in even multiples of \$1,000 and right justify, i.e., \$11,000 would be entered as **0011**.

### Data Entry

**Accession:** Required if the employee's work schedule is described above in Completion Instructions.

**Official Change:** Required if the **projected annual salary increases or decreases** and the **amount was originally furnished** for an employee described above in Completion Instructions.

**Separation:** N/A

**Updating Action:** Required if the personnel action is processed to correct this field.

---

**Merit Increase** (*numeric field; 8 positions*). Used to record the amount of increase for a merit pay employee.

---

**Completion Instructions**

Enter the amount of the merit pay increase and right justify, i.e., \$1,434 would be entered as **143400**. Leading zeros need not be entered.

**Data Entry**

*Accession:* N/A

*Official Change:* Required if the processing personnel action is a cancellation of a merit pay increase or restoring a merit pay increase.

*Separation:* N/A

*Updating Action:* N/A

---

**NTE Date** (*numeric field; 6 positions*). Used to record the not-to-exceed (NTE) date on which an employee's temporary appointment will expire unless the appointment is extended or renewed.

---

### Completion Instructions

Enter the not-to-exceed date as 6 numeric characters in month, day, and year order (e.g., **060994**). Do not enter any punctuation. **Note:** If the not-to-exceed date will be the year 2000 or beyond, enter **00** (2000), **01** (2001), etc., for the year. For example, if the not-to-exceed date is June 3, 2000, enter **060300**.

### Additional Information

- This date must not be earlier than the effective date of the processing personnel action.
- The Payroll/Personnel System generates various appointment limitation reports.
- For payroll and timekeeper purposes, the NTE date is considered to be effective at the close of business (COB) on the date entered in this field.
- When the type of appointment is **03**, Competitive Indefinite, and the nature of action code specifies a term appointment or conversion to a term appointment, the NTE date must be present and must exceed one year.

When the NTE date is present, the type of appointment must be one of the following:

#### Code Definition

- |           |  |
|-----------|--|
| <b>03</b> | Competitive-Term, Taper, Indefinite SES-Military Term or Emergency |
| <b>04</b> | Competitive-Temporary, Special Need, SES-Time Limited/Career       |
| <b>08</b> | Excepted-Indefinite, Excepted-Limited (More than 1 year)           |
| <b>09</b> | Excepted-Temporary, SES-Time-Limited-Noncareer                     |

#### Data Entry

*Accession:* Required if the nature of action code indicates the employee's appointment is based on a not-to-exceed date limitation.

*Official Change:* Required if the processing personnel action is extending the appointment or correcting this field.

*Separation:* N/A

*Updating Action:* N/A

---

**Percent** (*numeric field; 2 positions*). Used to record the percentage amount of a retention allowance or supervisory differential.

---

**Completion Instructions**

- For a retention allowance, enter the percentage rate of the scheduled salary, which cannot exceed 25 percent. For example, 23% would be entered as **23**.
- For a supervisory differential, enter the percentage rate of the supervisory differential, i.e., 15% would be entered as **15**.

**Data Entry**

*Accession:* N/A

*Official Change:* Required if the NOAC on the processing personnel action is for a retention allowance or supervisory differential.

*Separation:* N/A

*Updating Action:* N/A

---

**Period Covered: From Date:** *(numeric field; 6 positions)*. Used to identify the beginning date of the period of performance covered by the award.

---

**Completion Instructions**

Enter the beginning date as 6 numeric characters in month, day, and year order (e.g., **060994**). Do not enter any punctuation.

*Official Change:* Required if the NOAC on the processing personnel action indicates an award.

*Separation:* N/A

**Data Entry**

*Accession:* N/A

*Updating Action:* N/A

---

**Period Covered - To Date:** *(numeric field; 6 positions)*. Used to identify the ending date of the period of performance covered by the award.

---

**Completion Instructions**

Enter the ending date as 6 numeric characters in month, day, and year order (e.g., **060994**). Do not enter any punctuation.

*Official Change:* Required if the NOAC on the processing personnel action indicates an award.

*Separation:* N/A

**Data Entry**

*Accession:* N/A

*Updating Action:* N/A

---

**Position Occupied** (*numeric field; 1 position*). Used to indicate if the employee's position is in the competitive service, excepted service, or senior executive service.

---

### Completion Instructions

The position occupied must be one of the following codes:

Code	Definition
------	------------

1	Competitive Service
2	Excepted Service
3	Senior Executive Service - General Position
4	Senior Executive Service - Career Reserved Position

Codes **1** and **2** are generated by the Payroll/Personnel System for all accession personnel actions based upon the nature of action code entered on the processing personnel action.

Code **3** or **4** must be entered if the employee is in the Senior Executive Service employees. (Enter the code in Block 34 of the SF-52).

### Additional Information

This data element is recorded on the employee's database SF-50B data elements record (IRIS Program IR122).

If any change is made to this code, the following elements must be reviewed and may have to be changed:

- Nature of action code
- Authority code
- Type of appointment code
- Tenure group code

### Data Entry

*Accession:* Required if the employee is in the Senior Executive Service.

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* N/A

*Updating Action:* N/A

---

**Previous Agency** (*alphanumeric field; 2 positions*). Used to identify the previous agency when the employee moves to another agency within the same department.

---

#### Completion Instructions

- Enter the two characters assigned for the first administrative subdivision of the losing Department.
- To view valid agency codes, see TMGT, Table 023, Agency/Bureau.

#### Additional Information

- This code is the 1st level of the organizational structure code.
- A split Time and Attendance Report (T&A) may be required if the effective date of the personnel action, which is changing or correcting this field, is other than

the first Sunday of the processing pay period. For detailed information on split T&A's, see the T&A procedure.

#### Data Entry

*Accession:* Required if this field is present on the PACT screen.

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* N/A

*Updating Action:* N/A

---

**Projected Sick Leave Usage Date** (*numeric field; 6 positions*). Used to record the projected expiration date of sick leave on a retirement or death action for a part-time employee with an uncommon tour of duty.

---

**Completion Instructions**

- Enter the projected sick leave usage date as 6 numeric characters in month, day, and year order (e.g., **060994**). Do not enter any punctuation.
- Complete this field when the employee is part-time with an uncommon tour of duty and there has been no change in this tour 180 days prior to the effective date of the retirement or death action.
- This field must be completed if a part-time employee's tour of duty was changed to full-time 180

days prior to the effective date of the retirement or death action.

**Data Entry**

*Accession:* N/A

*Official Change:* N/A

*Separation:* Required if the processing personnel action is a retirement or death action and the employee has an uncommon tour of duty.

*Updating Action:* N/A

---

**Retain Info: Pay Plan** (*optional, alpha field; 2 positions*). Used to identify the pay plan the employee will retain during the period of grade retention.

---

### Completion Instructions

- Enter the pay plan that the employee will retain during the period of grade retention. **Note:** This field should **only** be completed if the pay plan currently recorded on the employee's database salary record (IRIS Program 101) is **not** the pay plan that the employee will retain during grade retention.
  
- See the Grade And Pay Retention section in this chapter for instructions on how to use the PF4 function key to access the Add Retained Information screen and complete this field.

### Additional Information

- To view valid pay plan codes, see TMGT, Table 025, AD-350 (Personnel Block And Description).
- For more information about grade and pay retention, see the Grade and Pay retention section in this chapter.

### Data Entry

*Accession:* N/A

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* N/A

*Updating Action:* N/A

---

**Retain Info: Grade** (*optional, numeric field; 2 positions*). Used to identify the grade the employee will retain during the period of grade retention.

---

### Completion Instructions

Enter the grade the employee will retain during the period of grade retention. **Note:** This field should **only** be completed if the grade currently recorded on the employee's database salary record (IRIS Program 101) is **not** the grade that the employee will retain during grade retention.

See the Grade And Pay Retention section in this chapter for instructions on how to use the PF4 function key to access the Add Retained Information screen and complete this field.

### Additional Information

For more information about grade and pay retention, see the Grade and Pay retention section in this chapter.

### Data Entry

*Accession:* N/A

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* N/A

*Updating Action:* N/A

---

**Retain Info: Occ Series** (*optional, numeric field; 4 positions*). Used to identify the occupational series code the employee will retain during the period of grade retention.

---

### Completion Instructions

- Enter the occupational series code the employee will retain during the period of grade retention. **Note:** This field should **only** be completed if the occupational series code currently recorded on the employee's database salary record (IRIS Program 101) is **not** the occupational series code that the employee will retain during grade retention.
  
- See the Grade And Pay Retention section in this chapter for instructions on how to use the PF4 function key to access the Add Retained Information screen and complete this field.

### Additional Information

- To view valid occupational series codes, see TMGT, Table 018, Occupational Series Alpha Descriptions.
- For more information about grade and pay retention, see the Grade and Pay retention section in this chapter.

### Data Entry

*Accession:* N/A

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* N/A

*Updating Action:* N/A

---

**Retain Info: Occ Func Code** (*optional, numeric field; 4 positions*). Used to identify the function code (if applicable) for the occupational series code the employee will retain during the period of grade retention.

---

### Completion Instructions

Enter the occupational function code for the occupational series code that the employee will retain during the period of grade retention. **Note:** This field should **only** be completed if the occupational function code currently recorded on the employee's database salary record (IRIS Program 101) is **not** the occupational function code for the occupational series code the employee will retain during grade retention.

See the Grade And Pay Retention section in this chapter for instructions on how to use the PF4 function key to access the Add Retained Information screen and complete this field.

### Additional Information

To view valid occupational function codes, see TMGT, Table 019, Functional Classification Description.

For more information about grade and pay retention, see the Grade and Pay retention section in this chapter.

### Data Entry

*Accession:* N/A

*Official Change:* Required if the NOAC on the processing personnel action indicates a change or correction to this field.

*Separation:* N/A

*Updating Action:* N/A

---

**Tangible Benefits (1 = Yes or Space)** (*numeric field; 1 position*). Used to indicate if the value of the award is based on tangible benefits.

---

**Completion Instructions**

Enter *1* in this field if the value of the award is based on tangible benefits.

Leave this field blank if the value of the cash award is based on intangible benefits.

**Data Entry**

*Accession:* N/A

*Official Change:* Required if the processing personnel action is a cash award, and the value of the award is based on tangible benefits.

*Separation:* N/A

*Updating Action:* N/A

---

**Verify Amount of Award** (*numeric field; max. of 7 positions*). Used to verify the monetary amount of an award or separation incentive.

---

**Completion Instructions**

Enter the total amount of money approved for the award. Leading zeros need not be entered.

**Data Entry**

*Accession:* N/A

*Official Change:* Required if the processing personnel action is for an award.

*Separation:* N/A

*Updating Action:* N/A

*Changes:*

## Official Changes

The instructions in this section are based upon OPM regulations, public laws, etc., and the processing requirements of the U.S. Department of Agriculture's Payroll/Personnel System. Departments and non-Federal agencies not governed by OPM may supplement this section with additional instructions authorized by their individual agency.

Any action that does not result in the addition or separation of an employee from an agency/department is considered to be an official change action. An official change action generally corrects, changes, deletes, or adds data that was previously omitted from the employee's database record. Examples of official change actions are:

- A correction action processed to correct or supply data required by OPM because the data was either submitted incorrectly or was previously omitted.
- A cancellation action processed to void or cancel a change action previously processed because the action (1) was improper or (2) contained unfavorable or untrue remarks.
- A conversion action that converts an employee within an agency/department from one appointment to another in the competitive or excepted service of the same or different appointing office.

Many other personnel actions, e.g., reassignments, leave without pay, changes to lower grade, etc., are also considered to be official change actions. **Note:** A transfer into a Department from another Federal agency, or reemployment after a separation from the rolls has become effective, is not considered to be a change action, and must be processed as an accession personnel action. For detailed information, see [Accessions](#) in this chapter.

An official change action for an employee is usually initiated by the respective agency/department. However, the Payroll/Personnel System automatically generates certain personnel actions, such as the Federal pay increase, change in SCD, within-grade increase, etc., that occur for a large number of employees. The Payroll/Personnel System generates these actions during the year in the appropriate pay period, and no action is necessary on the part of the agency.

Correction actions are usually retroactive and relate back to the effective date of the personnel action being corrected. Whenever a correction action is processed in the Payroll/Personnel System, the nature of action code (NOAC) and effective date on the processing correction action must be the same as the NOAC and effective date of the last official action recorded on the employee's database personnel actions summary record (IRIS Program 125). However, some NOAC's, e.g., recruitment bonuses, cash awards, etc., do not have to be cancelled to process a correction to a previous NOAC. For a list of these NOAC's, see [Corrections](#) and/or [Cancellations](#) in this chapter.

When an official change action or correction action is processed with an effective date prior to the current processing pay period and the action affects the employee's salary, such as a promotion, change to lower grade, within-grade increase, etc., the Payroll/Personnel System will automatically adjust the employee's salary during the same pay period the delayed personnel action is processed. The Payroll/Personnel System also makes retroactive adjustments up to 25 pay periods prior to the current processing pay period.

The following section contains information and processing instructions for mass actions, system-generated actions, various miscellaneous change actions, correction and cancellation actions, and update actions. See [PACT Data Elements](#) in this chapter for data entry and general processing instructions for the individual PACT data elements.

## Mass Actions

A mass (list) action may be used when: (1) the personnel action for a group of employees occurs on the same effective date, and (2) no change occurs in the employees' pay, position, or grade, and (3) the NOAC and authority for the action taken on each employee is the same.

□ A mass (list) action may be used to process the following types of accession and separation personnel action:

- NOAC 132 - Mass Transfers
- NOAC 352 - Termination - Appt in (only when separation is due to mass transfer)

□ A mass (list) action may be used to process the following official change actions:

- NOAC 280 - Placement In Pay Status
- NOAC 430 - Placement In Nonpay Status
- NOAC 471 - Furlough
- NOAC 472 - Furlough - NTE
- NOAC 760 - Ext of Appt NTE
- NOAC 761 - Ext of Summer Appt NTE
- NOAC 765 - Ext of Term Appt NTE
- NOAC 766 - Ext of O/S Ltd Appt NTE
- NOAC 781 - Change in Work Schedule
- NOAC 790 - Realignment
- NOAC 792 - Change in Duty Station
- NOAC 800 - Change in Data Element
- NOAC 883 - Change in Vet Pref

□ If the mass action involves any change(s) to the employees' Master Record or Individual Position in the Position Management System (PMSO), the data must be changed in PMSO **before** the mass action can be processed. For example, a mass action must be processed for 37 employees reassigned to a new duty station. The duty station must be changed in the PMSO Individual Record for each of the 37 employees before the mass actions are processed in PACT.

□ Most mass actions that involve more than 50 employees with 50 position changes can be processed and system-generated. However, mass actions for 50 or more employees are considered to be special requests and may require a reimbursable agreement. These requests must be submitted to USDA's Policy Analysis and Coordination Center, Automated Personnel Division (PA/APSD). PA/APSD will coordinate the implementation of the special request with the NFC Applications Systems Division (ASD). **Note:** PA/APSD

must provide NFC/ASD with advanced notification for the mass action request at least two pay periods prior to the effective date of the change. Therefore, the mass change request must be submitted to PA/ASD well in advance of the effective pay period. PA/ASD personnel will provide guidance on whether or not the personnel action can be processed as a mass action. If PA/ASD determines that the mass action can be system-generated, the agency will be required to furnish any special Payroll/Personnel System requirements that may be needed to process the mass action. The mass change request must include the following data elements:

- the effective date of the mass action
- the authentication date of the mass action
- the NOAC for the change being processed
- the authority code and authority code description
- the selected criteria being changed (e.g., existing organizational structure code and new organizational structure code)

NFC will not process any mass action requests that are based strictly on selected social security numbers, names, etc. The mass action request must be based upon a singular item such as all employees in a specific occupational series code, duty station, organizational structure, etc. After the agency furnished the necessary requirements, NFC updates PMSO and generates the personnel actions in the first pass of PINE for the effective processing pay period.

□ If the number of employees involved is 50 or less, and the mass action is not a realignment (NOAC 790), the agency must enter a separate personnel action with the appropriate mass action NOAC in PACT for each employee.

□ If the mass action is a **realignment** (NOAC 790), multiple mass actions can be processed in PACT through one PACT screen. After the first mass action is successfully added in PACT, the PF6 function key may be used to process the remaining mass actions. (For an example of an Add Realignment screen, see **Figure 10**).

**Adding A Mass Change Action (Realignment) Using The PF6 Function key.** The following instructions describe how to add more than one mass action using the PF6 function key. See the instructions in this chapter to add, change, view, or delete a personnel action. **Note:** When the NOAC on the processing personnel action is 790 (realignment), **UNM** must be keyed in the 1A Auth Code field.

Key data in the PMSO key fields and those fields that are required for the mass action (i.e., Previous Agency, Status, etc.).

Press [Enter].

After the data successfully passes system edits, the message *Document Successfully Added - Enter Next SSNO/ Press PF6 For Mass Change* is displayed at the bottom of the screen.

The cursor is positioned in the SSNO key field. Key in the next social security number over the SSNO displayed on the screen.

Press [PF6].

The PACT screen is refreshed but displays and retains the following data that was keyed in for the first mass action:

- The key fields (i.e., Dept/Agcy, POI, Eff Pay Period, etc.)
- The Effective Date field
- The PMSO Key: Dept, Agcy, and POI fields

The employee name field, which is system-generated after the employee's social security number is verified against the Employee Name database, displays the name for the new SSNO. However, the employee's name must be keyed in if the Employee Name database is unavailable.

The message *Key In Data Then Press Enter* is displayed at the bottom of the screen.

Key data in the required PMSO key fields (i.e., MR-NO, Grade, etc.) and those fields that are required for the mass action, and repeat the above process to enter the remaining mass actions.

### SINQ Messages For Mass Actions

- A rollback deletes from the Payroll/Personnel System database those personnel actions (agency-initiated or system-generated) that have applied during the same pay period as the mass action. A rollback(s) will occur when a personnel action, e.g., the mass action, has already applied to the employee's database and another personnel action(s) with an earlier effective date(s) is processed in a later PINE pass during the same processing pay period.
- The rolled back actions, including the mass action, are placed in SINQ and appear on the Listing of Personnel Error Messages with Override Code F and the error message *In SINQ Due To Rollback - Take Appropriate Action*. These actions will remain in SINQ until the user takes corrective action. To reprocess the mass action and the other personnel actions after the rollback occurs, the override code on each personnel action in SINQ must be changed to 9 (release) to release them from SINQ. For detailed information on rollbacks, see the PEP51 procedure.

```

PP79001M                                ADD REALIGNMENT                                XX/XX/XX
                                           (PF1=MENU)
SSNO 111111111 DEPT/AGCY AG 90  POI 5317  EFF PAY PERIOD 01      (PF3=RMKS)
AUTH DATE 01 01 96  FUNCTION A  OPER INIT XXX                  (PF5=HELP)
1ST NOA CODE 790    1A AUTH CODE UNM    1B AUTH CODE            (PF6=NEXT)
2ND NOA CODE          2A AUTH CODE          2B AUTH CODE          (CLR=EXIT)
*****
NAME LAST XXXXX                FIRST XXXXX                MIDDLE X
EFFECTIVE DATE
PMSO KEY: DEPT    AGCY    POI    MR-NO    GRADE    IP-NO
FEBHA COVERAGE                                PREVIOUS AGENCY
CLASSIFICATION ACTION CODE                    QUARTERS DEDUCTION AMOUNT
QUARTERS DEDUCTION CODE                      COLA/POST DIFFERENTIAL CODE
AGENCY AUTHORITY FOR THE ACTION              AUTHORITY ALPHA
REMARKS
                                           STATUS
DC904874 KEY IN REQUIRED FIELDS AND PRESS ENTER TO ADD DOCUMENT
    
```

Figure 10. Add Realignment

## Federal Pay Increase

Federal pay increases are processed to provide salary increases mandated by legislative action or an Executive Order. When this occurs, the Table Management System (TMGT) is updated with the revised salary rates. In most cases, the Payroll/Personnel System processes the increase automatically for employees eligible to receive the increase. Personnel offices are informed when the increases are not automatically processed.

Personnel actions submitted for the same pay period as the Federal pay increase that involve a salary change or adjustment (such as a promotion or WGI) should reflect the new salary rates as increased by the Executive Order.

## Automatic Processing of Pay Increases

The Payroll/Personnel System automatically processes Federal pay increases for the types of employees listed below:

- Employees in Pay Plans AL, CO, DN, ES, EX, FC, FE, FO, FP, FS, GG, GH, GM, GS, GT, IR, IS, LE, MG, MS, MX, NE, NX, NY, PA, PE, TM, and TS.
- Employees who are paid at administratively determined rates (i.e., employees in Pay Plan AD) in those agencies that have notified the Department of Agriculture to automatically process the pay increase.
- The system will automatically generate pay adjustments for all reemployed annuitants. For reemployed annuitants whose salaries are offset by annuities from the Civil Service Retirement System (CSRS) or Federal Employees Retirement System (FERS) (Annuitant Indicator codes A, C, E, 1, 4, or 5), personnel offices must also prepare personnel actions when OPM authorizes a cost-of-living adjustment for CSRS and FERS retirement annuities. The increased amount of the employee's annuity must be recorded in the Annuitant Share Amt field.

## Pay Increases Not Processed Automatically

The Payroll/Personnel System does not automatically generate Federal pay increases for the following employees:

- Experts and consultants (i.e., employees in Pay Plans CG, EC, ED, EE, EF, EG, EH, EI, and IC)
- Employees paid at statutory rates (i.e., employees in Pay Plan SR)
- Employees in Pay Plans CP, FA, IJ, IL, LP, RE, SL, ST, TF, TR, and TW with the exception of employees in those agencies that have notified NFC to automatically process the pay increase (The pay adjustments for Pay Plans IL, SL, and ST are made at the discretion of the department/agency.)

- Employees in Pay Plans AD (except for those agencies that have notified NFC to automatically process the pay increase), AE, DB, FN, HA, NB, PD, RA, and SB
- Employees who are being paid under Pay Rate Determinant Code 2, 3, 4, or M, or S
- Employees in Pay Plans GS and GM who are being paid under cooperative agreements and for whom the Federal Government does not pay all the salary (The cooperator pays a portion of the salary)
- Employees in Pay Plans GG and GH who are being paid under cooperative agreements

**Note:** Employees who are Americorps members (Special Employment Programs Code V8) are not eligible to receive the Federal pay increase.

Lists of employees in the "not processed automatically" are produced and mailed to the department/agency in advance of the Federal pay increase. Personnel offices should review the lists, verify eligibility for the Federal pay increase, and enter a personnel action in PACT, EPIC, or FESI for each employee eligible for a Federal pay increase.

Federal pay increases for employees who (1) are hired or reappointed in the pay period immediately preceding the pay raise, or (2), whose status changes after the lists are produced and are covered in one of the "not processed automatically" categories, will **not** be generated by the Payroll/Personnel System. Personnel offices must determine if these employees are eligible for the Federal pay increase, and enter the personnel action in PACT, EPIC, or FESI for each employee eligible for a Federal pay increase.

## Data Required For A Salary Change Personnel Action

In addition to the standard items required for a salary change, the personnel action must include the following:

- The new scheduled salary rate
- The effective date of the new rate (i.e., January 13, 2002)
- Nature of Action Code 894, QWM/ZLM, Reg. 531.205, and Executive Order Number 13249 for General Schedule employees (e.g., GS, GM, etc.)
- Nature of Action Code 894, ZLM, Reg. 534.504, and Executive Order Number 13249 for Pay Plans SL and ST
- Nature of Action Code 894, ZLM, and Executive Order Number 13249 for Senior Executive Service (SES) employees
- Nature of Action Code 894, ZLM, and the authority cited by the agency for Pay Plan AD
- **Note:** Those agencies with special authorities must use the authority cited by the agency. For detailed

instructions, refer to OPM's Guide to Processing Personnel Actions, Chapter 17.

- The authentication date, which is the **same** date the Executive order for the Federal pay increase is signed (i.e., 12/28/01)

### Life Insurance Coverage

If there is an increase in the regular life insurance coverage as a result of the pay increase, the related increase in life insurance deductions will be effective at the same time.

### Personnel Edit Subsystem (PINE) Edit Messages For Federal Pay Increases

A rollback deletes from the Payroll/Personnel System database those personnel actions (agency-initiated or system-generated) that have applied during the same pay period as the Federal pay increase. A rollback(s) occurs when a personnel action, e.g., the Federal pay increase, has already applied to the employee's database and another personnel action(s) with an earlier effective date(s) is processed in a later PINE pass during the same processing pay period.

These actions, including the Federal pay increase, are placed in suspense (i.e., SINQ or EPIC suspense) and will appear on the Listing of Personnel Error Messages with Override Code F with the edit message *In SINQ Due To Rollback-Take Appropriate Action*. These actions will remain in suspense until action is taken. To reprocess the Federal pay increase and the other personnel actions after the corrections are made, the override code on each personnel action in suspense must be changed to 9 (release) to release them. For detailed information on rollbacks, see the PEP51 procedure.

The system produces Document Type 999 informational error messages on the Listing of Personnel Error Messages during the pay period in which the Federal pay increase is effective to identify employees who did not receive an automatic Federal pay increase (e.g., GM employees whose salaries are less than the minimum salary range for the next step) and who were not

included on the lists for pay increases not processed automatically. Personnel offices must determine if these employees are eligible for the Federal pay increase, and enter a personnel action in PACT, EPIC, or FESI for each employee eligible for a Federal pay increase. See the instructions listed under **Pay Increases Not Processed Automatically**.

### History Correction Update Processing System (HCUP)

If a HCUP package is processed during the pay period in which the Federal pay increase is effective, the system-generated actions (e.g., the change in service computation date (SCD), the Federal pay increase/locality-based comparability payment) must be rolled off the database. Special measures should be taken to ensure that these system-generated actions are reapplied during the pay period in which the Federal pay increase is effective.

### Appointment Limitations

Personnel actions processed during the pay period in which the Federal pay increase is effective must include the initial or replenished monetary appointment limitation amounts provided by the Executive order. The Payroll/Personnel System automatically increases the full limitation amounts and balances currently recorded in the database for employees whose full limitation amount is 40 percent of the first step of GS-3. Agencies must enter personnel actions in PACT for employees whose full limitations are other than 40 percent of the first step of GS-3.

### Other Situations Requiring Processing Of Personnel Actions

Personnel actions processed during the same pay period as the Federal pay increase that involve a salary change or adjustment (such as a promotion or WGI) for employees whose official duty station is in a locality pay area must reflect the **2002 scheduled** salary rate, which does not include the locality-based comparability payment. The Payroll/Personnel System will automatically increase the salary amount for employees who are entitled to receive locality pay.

**Locality-Based Comparability Payments**

The Federal Employees Pay Comparability Act of 1990 (FEPCA) (Public Law 101-509) provides for comparability payments within each locality that is determined to have a pay disparity of greater than 5 percent with non-Federal workers.

Most employees working in the 48 contiguous states (including Washington, D.C.; excluding Alaska and Hawaii) receive locality-based comparability payments, known as locality pay. Employees who are in

retained pay status receive full locality-based comparability payments.

A total of 32 areas have been established as pay localities for 2002. The geographic boundaries of the pay localities coincide with the existing boundaries of the 32 Metropolitan Statistical Areas (MSA's) and Consolidated Metropolitan Statistical Areas (CMSA's). The percentage factor is based on the geographic location of the employee's official duty station. The areas designated as locality pay areas for 2002 and the corresponding percentage factor for each area are:

<b>Locality Pay Area</b>	<b>Percentage Factor</b>
Atlanta, GA MSA	9.74%
Boston-Worcester-Lawrence, MA-NH-ME-CT CMSA	13.57%
Chicago-Gary-Kenosha, IL-IN-WI CMSA	14.58%
Cincinnati-Hamilton, OH-KY-IN-WI CMSA	12.09%
Cleveland-Akron, OH CMSA	10.33%
Columbus, OH MSA	10.70%
Dallas-Fort Worth, TX CMSA	10.90%
Dayton-Springfield, OH MSA	9.62%
Denver-Boulder-Greeley, CO CMSA	13.34%
Detroit-Ann Arbor-Flint, MI CMSA	14.71%
Hartford, CT MSA, plus that portion of New London County not located within the Hartford, CT MSA	14.11%
Houston-Galveston-Brazoria, TX CMSA	18.61%
Huntsville, AL MSA	9.08%
Indianapolis, IN MSA	8.85%
Kansas City, MO-KS MSA	9.28%
Los Angeles-Riverside-Orange County, CA CMSA, plus Santa Barbara County, CA, and that portion of Edwards Air Force Base, CA not located within the Los Angeles-Riverside-Orange County, CA CMSA	16.05%
Miami-Fort Lauderdale, FL CMSA	12.45%
Milwaukee-Racine, WI CMSA	10.05%
Minneapolis-St. Paul, MN-WI MSA	11.56%
New York-Northern New Jersey-Long Island, NY-NJ-CT-PA CMSA	15.23%
Orlando, FL MSA	8.67%
Philadelphia-Wilmington-Atlantic City, PA-NJ-DE-MD CMSA	12.11%
Pittsburgh, PA MSA	9.52%
Portland-Salem, OR-WA CMSA	11.64%
Richmond-Petersburg, VA MSA	9.67%
Sacramento-Yolo, CA CMSA	11.99%
St. Louis, MO-IL MSA	8.98%
San Diego, CA MSA	12.70%
San Francisco-Oakland-San Jose, CA CMSA	19.04%

Seattle-Tacoma-Bremerton, WA CMSA .....	11.77%
Washington-Baltimore, DC-MD-VA-WV CMSA .....	11.48%
Rest of U.S. (RUS) - portions of the United States not located within another pay locality area .....	8.64%

□ Locality pay is paid as part of the employee's biweekly salary and is used in determining the calculations for retirement annuity and contributions to the Thrift Savings Plan (TSP), life insurance, and overtime and other premium pay. For most employees, the amount of locality pay is determined by multiplying the employee's scheduled annual rate of pay by the percentage factor authorized for the locality pay area.

### Automatic Processing Of Locality-Based Comparability Payments And The Federal Pay Increase

When an increase in both locality pay and the Federal pay increase is authorized under 5 U.S.C. 5303, the Payroll/Personnel System automatically generates **one** personnel action for **both** increases. In addition to the standard items required for a salary change, the personnel action includes:

- The effective date of the new rate (i.e., January 13, 2002)
- Nature of Action Code 894, QWM/ZLM, Reg. 531.205, and the Executive Order Number
- The authentication date, which is the **same** date the Executive Order for the Federal pay increase is signed

### Automatic Processing Of Locality-Based Comparability Payments

In the event that employees would only receive an increase in locality-based comparability payments (no Federal pay increase authorized), the Payroll/Personnel System would automatically process only the locality-based comparability payments. In addition to the standard items required for a salary change, the personnel actions would include:

- The effective date of the new rate (i.e., January 13, 2002)
- Nature of Action Code 895, VGR, 5 U.S.C. 5304
- The authentication date

Personnel actions processed during the same pay period as the locality-based comparability payments that involve a salary change or adjustment (e.g., WGI or a promotion) for employees whose official duty station is in a locality pay area must reflect the **scheduled salary rate**, which does **not** include the locality-based compa-

rability payment. The Payroll/Personnel System will automatically increase the salary amount for employees who are entitled to receive locality pay.

### Employees Ineligible To Receive Locality-Based Comparability Payments

The following two groups of GS employees do not receive locality-based comparability payments:

- Employees entitled to special salary rates whose scheduled salaries exceed the locality pay for their pay areas
- Law enforcement officers who are receiving geographic special pay adjustments that are higher than the locality pay in their areas

### Change In Locality Pay Area

When an employee's official duty station is changed to a different locality pay area, the employee's entitlement to the locality rate of pay for the new locality area will begin on the effective date of the personnel action that is changing the duty station.

### Termination Of Locality Pay

Entitlement to locality pay will terminate on the effective date that:

- The employee's official duty station is no longer in a locality pay area
- The employee's special rate of pay under 5 U.S.C. 5305 (or similar provision of law, other than section 403 of FEPCA) exceeds the locality rate of pay
- The employee moves to a position not covered by locality pay
- The employee separates from Federal service

### Personnel Edit Subsystem (PINE) Edit Messages For Locality-Based Comparability Payments

A rollback deletes from the Payroll/Personnel System database those personnel actions (agency-initiated or system-generated) that have applied during the same pay period as the locality-based comparability payments. A rollback(s) occurs when a personnel action, e.g., the locality-based comparability payment, has already applied to the employee's database and another personnel action(s) with an earlier effective date(s) is processed in a later PINE pass during the same processing pay period.

These actions, including the locality-based comparability payment, are placed in suspense (i.e., SINQ or EPIC suspense) and will appear on the Listing of Personnel Error Messages with Override Code F with the edit message *In SINQ Due To Rollback-Take Appropriate Action*. These actions will remain in suspense until ac-

tion is taken. To reprocess the locality-based comparability payment and the other personnel actions after the rollback occurs, the override code on each personnel action in suspense must be changed to **9** (release) to release them. For detailed information on rollbacks, see the PEP51 procedure.

System Reference  
Required Only

## Within-Grade Increases

A within-grade increase (WGI) is an advancement in pay to the next step of the grade the employee currently occupies.

### General Schedule Or Equivalent Pay Plan

□ The Payroll/Personnel System automatically generates WGI's for classified employees in pay plans GS, GG, GS, GG, GM, GT, FO, FP, KG, KL, KS, LE, LG, NF, RG, RW, SP, VG, or ZP (other than the National Institute of Standards and Technology) and the employee:

- is not at the top step of the grade occupied
- has completed the required waiting period
- has performed at an acceptable level of competence
- has not received an equivalent increase during the waiting period.

□ For full-time and part-time employees, the Payroll/Personnel System credits full calendar days for full-time and part-time service, and projects the due date for the WGI according to the required number of weeks for each step as follows:

Rate of basic pay less than the rate of basic pay at step 4 - 52 calendar weeks in pay status

Rate of basic pay equal to or greater than the rate of basic pay at step 4 and less than the rate of basic pay at step 7 - 104 calendar weeks in pay status

Rate of basic pay equal to or greater than the rate of basic pay at step 7 - 156 calendar weeks in pay status

□ For intermittent employees, the Payroll/Personnel System credits actual days in pay status, and projects the WGI due date according to the required number of days in pay status as follows:

Rate of basic pay less than the rate of basic pay at step 4 - 260 days in pay status over a period of not less than 52 calendar weeks

Rate of basic pay equal to or greater than the rate of basic pay at step 4 and less than the rate of basic pay at step 7 - 520 days in pay status over a period of not less than 104 calendar weeks

Rate of basic pay equal to or greater than the rate of basic pay at step 7 - 780 days in pay status over a period of not less than 156 calendar weeks.

□ When the SCD-WGI is initially furnished on a personnel action, such as the processing of an accession action, and recorded on the employee's database WGI Information record IRIS Program IR303, the Payroll/Personnel System begins maintaining two records, creditable service and nonpay status, as shown on the T&A

and as recorded on personnel actions. Creditable service and nonpay status data is also displayed on IRIS Program IR303.

□ The Payroll/Personnel System will record the number of days an intermittent employee works plus the equivalent elapsed calendar days based on data submitted on the T&A. If a T&A is not received for an intermittent employee, fourteen days will be recorded as the elapsed calendar days for that pay period. When the calendar time requirements for the required waiting period have been met, this period of time may be extended by any non-creditable time on the rolls as follows:

- The recorded number of intermittent days worked is converted to the equivalent elapsed calendar days.
- The difference between the days determined above and the recorded elapsed calendar days will be used to extend the waiting period until such time as no difference occurs.

□ Nonpay status is creditable in the computation of the required waiting period for full-time or part-time employees when it does not exceed:

- 80 hours in the waiting period for employees whose rate of basic pay is less than the rate of basic pay at step 4
- 160 hours in the waiting period for employees whose rate of basic pay is equal to or greater than the rate of basic pay at step 4 and less than the rate of basic pay at step 7
- 240 hours in the waiting period for employees whose rate of basic pay is equal to or greater than the rate of basic pay at step 7

If the number of hours in nonpay status (other than military furlough or compensable injury) exceeds the amounts shown above, the waiting period is extended for every 80 hours in nonpay status (i.e., 80 hours, 160 hours, 240 hours, etc.) depending upon the step of the grade.

The following is an example of how the Payroll/Personnel System adjusts the SCD-WGI for a fulltime or part-time employee whose rate of basic pay is less than the rate of basic pay at step 4. In this example, the employee must have 52 calendar weeks in pay status to receive a within-grade increase, and the number of nonpay status hours creditable in the computation of the employee's required waiting period cannot exceed 80 hours.

- The total number of nonpay hours, which is any leave without pay (LWOP), absence without leave (AWOL) or suspension since the last recorded WGI are added together.

**Note:** If the total number of nonpay hours does **not** exceed the number of hours that are forgiven for the employee's waiting period, the Payroll/Personnel System will not make any adjustments to the SCD-WGI.

- Since this employee has a total of 240 hours of nonpay hours, which **exceeds** the 80 hours forgiven for this employee's waiting period, the Payroll/Personnel System would subtract the 80 hours forgiven from 240 hours of nonpay status ( $240 - 80 = 160$ ).
- The remaining number of nonpay hours (160) are converted to days ( $160 \div 8 = 20$ ).
- The SCD-WGI is then adjusted to reflect the converted number of calendar days (20) in accordance with the 2087-Hour Work Year Chart, which is located in the Guide To Processing Personnel Actions.

The adjustment outlined above is performed by the Payroll/Personnel System at the end of every pay period during the Biweekly Examination Analysis and Reporting (BEAR) process, and the WGI is generated in the appropriate pay period.

### Forms And Reports

□ For full-time and part-time employees, Form AD-658, Within-Grade Increase Record, is generated by the Payroll/Personnel System and distributed to agency personnel offices 14 weeks prior to the actual due date of the WGI.

For intermittent employees without a scheduled tour of duty, Form AD-658 is generated by the Payroll/Personnel System and distributed to the agency personnel office when the employee's intermittent database record (IRIS Program 129) indicates the employee has completed:

- 260 days in pay status in not less than 52 calendar weeks
- 520 days in pay status in not less than 104 calendar weeks
- 780 days in pay status in not less than 156 calendar weeks
- 780 days in pay status in not less than 156 calendar weeks

The following is an example of how the Payroll/Personnel System adjusts the SCD-WGI for an intermittent employee whose rate of basic pay is less than the rate of basic pay at step 4. In this example, the employee must have 52 calendar weeks in pay status to receive a within-grade increase, and the number of nonpay status hours creditable in the computation

of the employee's required waiting period cannot exceed 80 hours.

- Compute the total number of intermittent days worked and intermittent elapsed calendar days worked since the last recorded WGI. For example: 125 intermittent elapsed calendar days and 50 calendar days worked.
- The total number of intermittent days worked are converted to calendar days (e.g., 50 days worked  $\times 7 = 350$ ; then,  $350 \div 5 = 70$ ).
- The total number of calendar days are subtracted from the total number of intermittent elapsed calendar days ( $125 - 70 = 55$ ).
- The employee's SCD-WGI is adjusted by 55 days.

The adjustment outlined above is performed by the Payroll/Personnel System at the end of every pay period during the BEAR process, and the WGI is generated in the appropriate pay period

### Report Number Description

In addition to generating Form AD-658, the Payroll/Personnel System also produces the following reports prior to generating the WGI:

**AECO36S1 Classified Employee Within-Grade Increase Sixteen Week Listing.** This report, produced 16 weeks prior to the projected date of the WGI, lists employees whose WGI will be generated based on their latest performance appraisal rating, which is fully successful or higher.

**AECO36S2 Classified Employee WGI Status Sixteen Week Listing.** This report, produced 16 weeks prior to the projected date of the WGI, lists employees whose WGI will not be generated unless action is taken to change the performance appraisal rating to fully successful or higher before the effective date of the WGI.

**AECO36U4 Classified Employee Within-Grade Increase Four Week Notification.** This report, produced every pay period, lists employees whose WGI will be generated in 4 weeks based on their latest performance appraisal rating, which is fully successful or higher. This report updates the 16-week report previously issued (Report AECO36S1).

□ Each report and Form AD-658 displays data contained in the employee's database as of the ending date of the pay period in which the report is prepared. Error conditions on the reports must be corrected by processing personnel actions for all columns except Non Pay Status Hours. Nonpay status hours must be corrected in the Time Inquiry System (TINQ). For detailed information on TINQ, see the **TINQ procedure**.

□ Output Forms SF-50-B's, which are issued while the employee is in a waiting period for a WGI, will record the SCD-WGI furnished by the agency, or the date of creditable service and nonpay status being maintained by the Payroll/Personnel System. **Note:** Agencies should correct or adjust this date when previous service and/or nonpay status was not considered at the time this date was initially furnished for such service or nonpay status.

□ The Payroll/Personnel System will not generate a denial of a WGI for an employee who has failed to meet the acceptable level of competence requirements. A personnel action must be processed in PACT, using NOAC 888, Denial of Within-Grade Increase, to deny the WGI. The next AD-658 will not be produced until approximately fourteen weeks in advance of one year from the date of completion of the initial waiting period.

□ To process a delayed WGI because of favorable reconsideration, the personnel office must take action to change the performance appraisal rating to fully successful or higher and process the WGI personnel action in PACT, using Nature of Action Code 893, Within-Grade Increase.

If the WGI is retroactive, the WGI due code must be coded **I** (due) in the employee's personnel supplements record (IRIS Program 123). If the WGI due code is coded other than **I**, process an NFC-74, Master File Change Document, through PRES to change this code to **I** (due) **prior** to processing the WGI personnel action in PACT.

□ Report Number AECO36T7, Classified Employee Control Listing of Within-Grade Increase Forms for F/T and P/T Employees, is produced each pay period and distributed to agency personnel offices to identify those employees whose WGI's are not processed automatically. Forms AD-658 are also produced by the Payroll/Personnel System for these employees and distributed to the agency personnel offices. Agencies must process a WGI personnel action in PACT for these employees.

#### Federal Wage System Employees

□ The Payroll/Personnel System automatically generates WGI's for Federal Wage System employees at the

beginning of the first applicable pay period following completion of the required waiting period, provided the employee's performance evaluation is fully successful and the employee has not received an equivalent increase during the waiting period.

□ The Payroll/Personnel System produces Report Number AECO37U3, Federal Wage System WGI Status Eight Week Notification. This report, produced eight weeks prior to the projected date of the WGI, lists employees whose WGI will not be generated because of unsatisfactory performance evaluations.

A new performance evaluation must be processed for employees, listed on Report AECO37U3, who meet an acceptable level of performance requirements after the report is produced. The WGI will not be generated until the new performance evaluation is processed.

#### Denial Of Within-Grade Increase

□ The Payroll/Personnel System will not generate a denial of a within-grade increase for an employee who has failed to meet the acceptable level of competence requirements. A personnel action must be processed in PACT, using NOAC 925, Withholding WGI-Wage, to deny the WGI. This denial must be processed prior to the effective pay period of the WGI. It is the agency's responsibility to maintain the WGI due date for Federal Wage System employees.

#### Processing Delayed Within-Grade Increase

□ To process a delayed WGI because of favorable reconsideration, the agency personnel office must take action to change the performance appraisal rating to fully successful or higher and process the WGI personnel action in PACT, using NOAC 893.

If the WGI is retroactive, the WGI due code must be coded **I** (due) in the employee's database personnel supplements record (IRIS Program 123). If the WGI due code is coded other than **I**, process an NFC-74 through PRES to change this code to **I** (due) **prior** to processing the WGI personnel action in PACT.

## Change In Service Computation Date

### Automatic Adjustments - During The Year

The Payroll/Personnel System automatically adjusts the service computation date (SCD) for leave when a personnel action is processed to change an employee from intermittent to full-time or part-time.

Output Forms SF-50-B's are issued with Remarks Code 540, "SCD Dates for Leave, RIF, Retirement, and TSP adjusted by (number) days computed from (number) intermittent hours worked during (number) elapsed calendar days. Previous dates were leave (date), RIF (date), and/or retirement (date)," and G30, "Intermittent employment totaled (number) hours in work status from (date) to (date)," or G29, "Intermittent employment totaled (number) hours in pay status from (date) to (date)," to record the most current period of intermittent service.

### Automatic Adjustments - End-Of-Leave Year

The Payroll/Personnel System automatically adjusts the SCD for leave, RIF, retirement, and TSP at the end of each leave year for employees who are on the agency rolls at the time of the adjustment. The adjustment of these dates is generated and processed each year during the processing of transactions in Pay Period 1.

□ The SCD's for full-time and part-time employees are adjusted for all nonpay status (excluding military furlough or compensable injury time) that exceeds 6 months and which occurred during the calendar year (January through December). Output Forms SF-50-B's are issued with Remarks Code B32, "Changes SCD from (date) to reflect excess time in nonpay status during calendar year (XX)" for full-time and part-time employees.

The following is an example of how the Payroll/Personnel System adjusts the SCD's for leave, RIF, retirement, and TSP for a full-time or part-time employee who had an excess of 6 months of LWOP during the calendar year:

- The total number of nonpay hours, which is any leave without pay (LWOP), absence without leave (AWOL), absence without pay (AWOP recorded on a split T&A that was submitted in the previous calendar year), or suspension since the last recorded WGI are added together. **Note:** Any suspension, AWOL, or LWOP recorded on a split T&A for the **current** calendar year will be used in the adjustment that will occur during the **next** calendar year.
- Subtract 1044 (6 months) from the total number of nonpay hours. If the result is zero or minus, no adjustment is made.

- Convert the number of excess hours to days (divide the total by 8).
  - The total number of days are then converted to calendar days. This is computed by multiplying the total number of days by 7, and then dividing that total by 5.
  - The number of calendar days are converted to months. This is computed by dividing the total number of calendar days by 30.
  - The SCD's are then adjusted by the total number of months and/or calendar days.
- The SCD's for intermittent employees are adjusted to record the number of days worked under the intermittent appointment during the calendar year. An output Form SF-50-B is issued with Remarks Code B31, "Changes SCD from (date) to reflect (number) hours worked under intermittent appointment(s)".

The following is an example of how the Payroll/Personnel System adjusts the SCD's for leave, RIF, retirement, and TSP for an intermittent employee based upon the total number of hours worked for intermittent service. This adjustment is performed by the Payroll/Personnel System every pay period to determine if a change in work schedule has occurred and if the dates need to be adjusted.

- The number of intermittent hours worked since the last adjustment in SCD (if applicable) are converted to calendar days using the 2087-Hour Work Year Chart located in the Guide To Processing Personnel Actions (hours do not include premium pay).
- The calendar days are then subtracted from the intermittent elapsed calendar days worked since the last adjustment in SCD (if applicable).
- The SCD's are then adjusted by the total obtained from subtracting the calendar days from the intermittent days.

### SINQ Messages For SCD Adjustments

□ A rollback deletes from the Payroll/Personnel System database those personnel actions (agency-initiated or system-generated) that have applied during the same pay period as the SCD adjustment. A rollback(s) will occur when a personnel action, e.g., the SCD adjustment, has already applied to the employee's database and another personnel action(s) with an earlier effective date(s) is processed in a later PINE pass during the same processing pay period.

□ The rolled back actions, including the SCD adjustment, are placed in SINQ and appear on the Listing of Personnel Error Messages with Override Code F and the error message *In SINQ Due To Rollback*

- *Take Appropriate Action.* These actions will remain in SING until the user takes corrective action. To reprocess the SCD adjustment and the other personnel actions after the rollback occurs, the override code on each

personnel action in SING must be changed to **9** (release) to release them from SING. For detailed information on rollbacks, see the PEP51 procedure.

System Retired  
Reference Only

## Change In Tenure/Type Of Appointment Code

The Payroll/Personnel System credits full calendar time for periods of full-time and part-time service, and seven days of calendar time for every five days of intermittent service.

- When the career tenure date is initially furnished, the Payroll/Personnel System begins maintaining two records, creditable service and nonpay status, as shown on the T&A and as recorded on personnel actions. Creditable service is recorded on the employee's database intermittent record (IRIS Program 129) and nonpay status is recorded on the employee's database leave record (IRIS Program 140).

The Payroll/Personnel System adjusts the tenure and type of appointment codes based upon the completion of three years of creditable calendar time. **Note:** This adjustment does not apply to Taper or indefinite employees since there is no change in tenure group while the employee continues to serve under a taper or indefinite appointment.

### Special Processing Considerations

When the career tenure date is initially furnished, the Payroll/Personnel System begins maintaining two records, creditable service and nonpay status, as shown on the T&A and as recorded on personnel actions. Creditable service is stored and recorded on the employee's database intermittent record (IRIS Program 129); nonpay status is stored and recorded on the employee's nonpay leave record (IRIS Program 140).

If a personnel action is processed to change or correct this date, the Payroll/Personnel System disregards the previous record of creditable service stored on IRIS Program 129 and begins (during the pay period in which the personnel action is processed) maintaining new record. However, the excess nonpay status recorded on IRIS Program 140 will remain the same.

If a personnel action is processed to remove this date, both the creditable service and excess nonpay status records are removed from the employee's database.

For each period of nonpay status (except military furlough or compensable injury), creditable service is reduced for each calendar day of nonpay status which is in excess of 30 calendar days. For example, if an employee was in a continuous nonpay status for 90 calendar days and then returned to duty, this period of nonpay status would extend the waiting period by 60 calendar days.

When a period of nonpay status is terminated by pay status, the Payroll/Personnel System examines the total amount of nonpay status to see if it exceeds 30 calendar days. The total amount of nonpay status is then removed from the employee's database record so that a new period of nonpay status (if it occurs) can be recorded. If the period of nonpay status exceeds 30 calendar days, the excess time is placed in a separate record and is used in determining completion of the waiting period. This separate record of excess nonpay status is increased accordingly each time a period of nonpay status exceeds 30 days. If the period of nonpay status is 30 days or less, the record of nonpay status is not changed.

### Additional Information

- If previous service is unknown, enter the effective date of the accession personnel action.
- If this field is left blank, the effective date of the accession action will be generated for this field if the nature of action code is:
  - 100 - Career Appt
  - 101 - Career Cond Appt
  - 140 - Reins - Career Appt
  - 141 - Reins - Career Cond Appt
  - 170 - Excepted Appt
- The career tenure date cannot be later than the effective date of the accession personnel action.
- If the career tenure date is **prior** to the effective date of the accession, adjust the date to include any previous service which is creditable toward the career tenure waiting period. Do not adjust this date to include periods of nonpay status; nonpay status data must be entered through PRES Document Type 160, Record of Leave Data Transferred.
- For Taper and Indefinite appointments in the competitive service, show the beginning date of creditable service toward career status under P.L.90-105.
- If the service will be credited when the employee is converted to another appointment, e.g., Schedule B student appointments or VRA appointments, do not complete this field for the current appointment.
- If the career tenure date is not furnished at the time of the accession personnel action, the Payroll/Personnel System will not maintain any record of creditable service and/or nonpay status.
- Do not process a personnel action to remove the career tenure date upon completion of the career tenure period. The Payroll/Personnel System will automatically remove this date when a minimum of three years of creditable service has been completed.

- To remove or cancel a date in the Career Tenure Date field, enter six zeros in this field.

**System Retired  
Reference Only**

### Change In Probationary Period Start Date/Sup-Mgr-Prob-Per-Req Date

The Payroll/Personnel System automatically removes the probationary period start date or the Sup-Mgr-Prob-Per-Req date at the completion of the required time of creditable service. Do not process a personnel action to remove this date upon completion of the probationary or trial period for those employees who are on the agency rolls at the time of the adjustment.

#### Special Processing Considerations

The Payroll/Personnel System credits full calendar time for periods of full-time and part-time service, and 7 days of calendar time for every 5 days of intermittent service. Creditable service is reduced for each workday in nonpay status (other than for military furlough or compensable injury) which exceeds 22 workdays; e.g., up to 22 days of nonpay is considered creditable service since it is forgiven.

- When the probationary period start date or the Sup-Mgr-Prob-Per-Req date is initially furnished, the Payroll/Personnel System begins maintaining two records, creditable service and nonpay status, as shown on the T&A and as recorded on personnel actions. Creditable service is recorded on the employee's database intermittent record (IRIS Pro-

gram 129), and nonpay status is recorded on the employee's nonpay leave record (IRIS Program 140).

If a personnel action is processed to change or correct these dates, the Payroll/Personnel System disregards the previous record of creditable service stored on IRIS Program 129 and begins (during the pay period in which the personnel action is processed) maintaining a new record. However, the excess nonpay status recorded on IRIS Program 140 will remain the same.

If a personnel action is processed to remove this date, both the creditable service and excess nonpay status records are removed from the employee's database.

#### Additional Information

- If previous service is unknown, enter the effective date of the accession personnel action.
- Report Number AECO36T2, Notification of Expiration of Probationary or Trial Period, is produced each pay period and distributed to agency personnel offices to identify those employees approaching expiration of probationary or trial periods. This report is produced 4 months prior to the expiration date.
- Employees who have previous service which is creditable toward these dates may not be required to serve the complete probationary period. Agency personnel offices must maintain manual records for these employees.

## Grade And Pay Retention

The instructions in this section are based upon the Office of Personnel Management (OPM) regulations, which are contained in Part 536 of Title 5, Code of Federal Regulations, and OPM's Guide to Processing Personnel Actions, Chapters 14 and 17. Agencies should refer to OPM's Guide to Processing Personnel Actions, Chapter 4, Table 4, to determine the applicable pay rate determinant (PRD) code for grade and/or pay retention.

An employee who meets specific eligibility requirements is eligible to retain his/her grade for a period of 2 years if:

- the employee is placed in a lower-graded position as a result of reduction-in-force procedures.
- the employee's position is reduced in grade as a result of a reclassification process.
- the agency offers grade retention to employees who are placed in lower-graded positions as a result of a reclassification or reorganization decision which is announced by management in writing as defined in 5 CFR 536.103(b).

An employee placed in a lower-graded position as a result of a reduction-in-force procedure or reorganization decision (which was announced by management in writing) is eligible for grade retention only if the employee served 52 or more consecutive weeks in a grade or grades higher than the grade of the lower-graded position. The requirement for 52 or more consecutive weeks may be in one or more positions, in one or more agencies, and at more than one grade level.

An employee placed in a lower-graded position as a result of a reclassification process is eligible for grade retention only if the previous position had been classified at a higher level grade(s) for a continuous period of at least 1 year prior to the reclassification process. The previous position may have been classified at more than one higher grade level during the 1-year period, and in any pay schedule. (The employee is not required to have 52 consecutive weeks or more in the previous position to be eligible for grade retention as a result of a reclassification process.)

Grade and pay retention will not apply if the employee:

- moves from a position that is not in an agency defined in U.S.C. 5102.
- is identified under 5 U.S.C. 2105(c), except prevailing rate employees included under 5 U.S.C. 5361.
- is reduced in grade or pay for personal cause or at the employee's request.

- is removed from a supervisory or managerial position because the probationary period for the position was not successfully completed.
- is other than a prevailing rate employee under 5 U.S.C. 5342(a)(2)(B) and is paid from nonappropriated funds under the jurisdiction of the Armed Forces.
- is entitled to receive basic pay under 5 U.S.C. 3594(c) because of removal from the Senior Executive Service (SES) and placement in a civil service position (other than an SES position) under 5 U.S.C. 3594(b)(2).

## Determining The Retained Grade

Before a personnel action is processed to establish grade retention, the employee's retained grade, the applicable rate schedule, and the rate of basic pay must be determined. **Note:** For purposes of grade and pay retention in this section, rate schedule refers **only** to: (1) the General Schedule (or equivalent pay plan), (2) special salary rate schedules for employees who are paid at a special salary rate (e.g., PRD Code 6), and (3) Federal Wage System schedules. It does **not include** areas designated as **locality pay areas**; therefore, the **rate of basic pay** must **not include locality-based comparability payments**.

An employee entitled to grade retention retains the grade of the position held immediately prior to the position change **if** the position was under a covered pay schedule immediately **prior** to the position change.

If the position held immediately prior to the position change was **not** under a covered pay schedule immediately **prior** to the position change, the employee retains:

- the lowest grade of the covered pay schedule for the position (in which the employee is placed) which has a representative rate equal to, or higher than, the representative rate of the grade held immediately prior to the position change, or
- the highest grade of the covered pay schedule for the position (in which the employee is placed) if there is no grade in the covered pay schedule that has a representative rate equal to, or higher than, the representative rate of the grade held immediately prior to the position change.

## Determining The Applicable Rate Schedule

Careful review of the eligibility requirements that entitle the employee to grade retention is necessary to determine the applicable rate schedule during the period of grade retention.

When an employee entitled to grade retention is placed in a lower-graded position in a different geographical

area, the employee is covered by the rate schedule for the position in the new geographical area. **Note:** The rate schedule for the position in the new geographical area refers **only** to: (1) the General Schedule (or equivalent pay plan), (2) special salary rate schedules for employees who are paid at a special salary rate (e.g., PRD Code 6), or (3) Federal Wage System schedules.

If the employee is paid under the General Schedule or a special salary rate schedule (e.g., PRD Code 6), and is placed in a lower-graded position that is **not** a **special salary rate** under a special salary rate schedule, the applicable rate schedule will be the General Schedule.

If the employee is paid under the General Schedule or a special salary rate schedule (e.g., PRD Code 6), and is placed in a lower-graded position that **is** covered by a **special salary rate**, the applicable rate schedule will be the special salary rate schedule for the **new** geographical area.

When an employee entitled to grade retention is placed in, or the position is changed to, a different occupational series code, the applicable rate schedule is generally the rate schedule for the new occupational series code.

If the employee is paid under the General Schedule or a special salary rate schedule (i.e., PRD Code 6, etc.), and is placed in a lower-graded position under the Federal Wage System, the applicable rate schedule will be under the General Schedule or the special salary rate schedule that applies to the **retained** occupational series code and grade, and new geographical area (if changing).

If the employee is paid under the Federal Wage System, and is placed in a lower-graded position in a new geographical area, the applicable rate schedule will be the Federal Wage System schedule for the new geographical area.

If the employee is paid under the Federal Wage System and is placed in a lower-graded position under the General Schedule or a special salary rate schedule, the applicable rate schedule will be the Federal Wage System schedule for the new geographical area (if changing).

### Determining The Rate Of Basic Pay

When an employee becomes eligible for grade retention or moves to another position during a period of grade retention under circumstances that permit the continuation of grade retention, the employee is entitled to the **greatest** of:

- the **rate** of basic pay **before** the position change.
- the **rate** of basic pay from the **applicable rate schedule** for the grade and step held by the employee

**before** the position change. (Refer to Determining the Applicable Rate Schedule.)

- the **lowest rate** of basic pay from the **applicable rate schedule** for the retained grade which **equals** or **exceeds** the rate of basic pay **before** the position change. (Refer to Determining the Applicable Rate Schedule.)

The following are examples of how to determine the rate of basic pay using the criteria outlined above. The examples also contain guidance on determining the PRD code that would apply for each example.

**Employee is entitled to receive the rate of basic pay before the position change.** A WS-09/05 employee, whose duty station is located in San Francisco, California, is paid \$24.32 per hour (Federal Wage System Pay Table 0607).

The employee is placed in a lower-graded position as a WS-08, in Santa Barbara, California (Federal Wage System Pay Table 0608).

- The **rate** of basic pay **before** the position change was **\$24. 32** per hour.
- The **rate** of basic pay for a WS-09/05 (the grade and step held by the employee **before** the position change) in Santa Barbara, California (Federal Wage System Pay Table 0608), is **\$20.00** per hour.
- There is **no lower** rate of basic pay from the Federal Wage System Pay Table 0608 for the retained grade (WS-09/05, in this example) which **equals** or **exceeds** the rate of basic pay **before** the position change (**\$24. 32** per hour).

Because there is no rate at the WS-09 level in the Federal Wage System Pay Table 0608 that equals or exceeds \$24.32 per hour, the employee would be entitled to retain **\$24. 32** per hour, which is the basic pay before the position change. PRD Code **V** would be used in this example, because the employee is moving to a different position and will receive retained pay while in grade retention, and the employee's step should be changed to **00**.

**Employee is entitled to receive the rate of basic pay from the applicable rate schedule for the grade and step held before the position change.** A GS-0462-04/08 employee, whose duty station is located in San Francisco, California, is paid a special salary rate of \$24,037 per annum (Special Salary Rate Schedule 0256).

The employee is placed in a lower-graded position as a WG-3502, Grade 03, in San Francisco, California.

- The **rate** of basic pay **before** the position change was **\$24,037.00** per annum.
- The rate of basic pay for a GS-0462-04/08 (the grade and step held by the employee **before** the position change) in San Francisco, California is **\$24,037** per annum (Special Salary Rate Schedule 0256).
- The **lowest** rate of basic pay from the Special Salary Rate Schedule 0256 for the retained grade (GS-04/08, in this example) which **equals** or **exceeds** the rate of basic pay **before** the position change is **\$24,037** per annum.

The employee would be entitled to retain the special salary rate of a GS-0462-04/08, which is **\$24,037** per annum. PRD Code **E** would be used for this example, because the employee is moving to a different position and is entitled to a special salary rate in the new position while in grade retention.

**Employee is entitled to receive the lowest rate of basic pay that equals or exceeds the rate of basic pay before the position change.** A GS-0303-06/04 employee, whose duty station is located in San Francisco, California, is paid a special salary rate of \$24,814 per annum (Special Salary Rate Schedule 0024).

The employee is placed in a lower-graded position as a GS-0303, Grade 05, in Missoula, Montana. **Note:** The employee will be paid under the General Schedule because there is no special salary rate schedule for a GS-0303, Grade 06, in Missoula, Montana.

- The **rate** of basic pay **before** the position change was **\$24,814.00** per annum.
- The **rate** of basic pay from the General Schedule for a GS-0303-06/04 (the grade and step held by the employee **before** the position change) in Missoula, Montana, is **\$23,396 per annum**. (A GS-0303-06 position is not covered by a special salary rate schedule in Missoula, Montana.)
- The **lowest** rate of basic pay from the General Schedule for the retained grade (GS-06, in this example) which **equals** or **exceeds** the rate of basic pay **before** the position change is **\$24,814** per annum (the basic pay for a GS-06/06 under the General Schedule).

The employee would be entitled to receive **\$24,814** per annum, and **should be placed in step 6**. PRD Code **A** would be used for this example, because the employee is moving to a different position and is **not** entitled to a special salary rate in the new position and duty station.

**Using the PF4 Function Key To Complete the Retain Info: Fields.** The PF4 function key, which is displayed on the PACT input screens for Nature of Action Codes 740, 741, 713, 866, and all of the 500 series nature of action codes, can be used to access the Add Retained Information screen. (For an example of an Add Retained Information screen, see **Figure 11**.) The Add Retained Information screen displays the following fields:

- Retain Info: Pay Plan, which identifies the pay plan the employee will retain during grade retention.
- Retain Info: Grade, which identifies the grade the employee will retain during grade retention.
- Retain Info: Occ Series, which identifies the occupational series code the employee will retain during grade retention.
- Retain Info: Occ Func Code, which identifies the function code (if applicable) for the occupational series code the employee will retain during grade retention.

These fields should be completed **only** if the data currently recorded on the employee's database salary record (IRIS Program 101) for any of the fields listed above is not correct. This could occur, for instance, if multiple downgrades are processed during the actual 2-year period of grade retention. For example:

- As a result of reduction-in-force procedures, a GS-9 employee is placed in a lower-grade position as a GS-7, which entitles the employee to grade retention for 2 years.
- A year later, **during** the 2-year period of grade retention, the employee is placed in a lower-graded position as a GS-5.
- The employee continues to retain the GS-9 position for the remainder of the original 2-year period of grade retention.
- After the original 2-year period of grade retention has expired, the employee is eligible to retain the GS-7 position for 1 year. However, the salary data in the employee's database salary record (IRIS Program 101) reflects the data for the **GS-9** position.
- A personnel action (Nature of Action Code 866/VKJ) to terminate the employee's grade retention at GS-7 would be processed, and the data entered in the Retain: Info fields should be the data for the GS-7 position. (The data in these fields should reflect data for the grade the employee will retain during grade retention.)

**Completing The Retain:Info Fields Using The PF4 Function Key.** The following instructions describe how to use the [PF4] function key to complete the Retain:Info fields. See the instructions in this chapter to add, change, or delete a personnel action.

Key in data in the key fields (i.e., SSNO, Dept/Agcy, etc.) displayed on the PACT menu.

Press [Enter].

The selected input screen (**Figure 11**) is displayed. The key fields from the PACT menu are displayed at the top of the input screen.

Key data in the fields required for the add position change.

Press [Enter].

After the data successfully passes system edits, the message *Document Successfully Changed - Press PF3/PF4 If Required* is displayed at the bottom of the screen.

If a description for a required or optional remarks code must be added, press [PF3] to display the Personnel Action Processing (PACT) - Additional Typing Remark Entry screen. Key in the required remarks description.

Press [Enter]. The message *Remarks Added - Status Changed to R (released)* is displayed at the bottom of the screen.

```

PP74001M                ADD POSITION CHANGE                XX/XX/XX
                                                                (PF1=MENU)
SSNO                    DEPT/AGCY        POI        EFF PAY PERIOD    (PF3=RMKS)
AUTH DATE              FUNCTION        OPER INIT    (F4=REIN)
1ST NOA CODE 740      1A AUTH CODE      1B AUTH CODE  (PF5=HELP)
2ND NOA CODE          2A AUTH CODE      2B AUTH CODE  NEXT DOC     (CLR=EXIT)
*****
NAME LAST              FIRST              MIDDLE
EFFECTIVE DATE
PMSO KEY: DEPT        AGCY        POI        MR-NO        GRADE        IP-NO
PAY PLAN              STEP        BASE SALARY    VERIFY SALARY
PAY RATE DETERMINANT CODE    NTE DATE
GRADE RETENTION EXPIRATION DATE    PREVIOUS AGENCY
CLASSIFICATION ACTION CODE
SPVR/MGRL PROB PERIOD STARTING DATE
SPECIAL EMPLOYMENT PROGRAM CODE    SPEC EMPLOYEE CODE    ADJ SAL
COOP OVERTIME RATE                COOP HOLIDAY RATE
COLA/POST DIFFERENTIAL CODE        DATE ENTERED PRESENT GRADE
AUTHORITY ALPHA                    AGENCY USE

REMARKS                                                                STATUS
DC904874 KEY IN REQUIRED FIELDS AND PRESS ENTER TO ADD DOCUMENT
    
```

**Figure 11. Add Position Change Screen**

Press [PF4] to display the Add Retained Information screen (**Figure 12**).

employee will retain during the period of grade retention.

Complete the Retain Info: fields as follows:

**Retain Info: Pay Plan** (*optional, alpha field; 2 positions*). Enter the pay plan the employee will retain during the period of grade retention.

**Retain Info: Occ Func Code** (*optional, numeric field; 4 positions*). Enter the function code (if applicable) for the occupational series code the employee will retain during the period of grade retention.

**Retain Info: Grade** (*optional, numeric field; 2 positions*). Enter the grade the employee will retain during the period of grade retention.

Press [Enter].

**Retain Info: Occ Series** (*optional, numeric field; 4 positions*). Enter the occupational series code the

After the data successfully passes system edits, the message *Document Successfully Updated With Retained Information* is displayed at the bottom of the screen.

```

PP000RIM                ADD RETAINED INFORMATION                XX/XX/XX
                                                                (PF1=PACT)
                                                                (CLR=EXIT)
SSNO                    DEPT/AGCY      POI      EFF PAY PERIOD
AUTH DATE              FUNCTION      OPER INIT
1ST NOA CODE  740      1A AUTH CODE      1B AUTH CODE
2ND NOA CODE              2A AUTH CODE      2B AUTH CODE
*****
NAME LAST X                FIRST X                MIDDLE
RETAINED INFO:  PAY PLAN      GRADE      OCC SERIES      OCC FUN CODE

FILL IN RETAIN INFORMATION AND PRESS <ENTER>
    
```

**Figure 12. Add Retained Information Screen**

### Special Processing Considerations

Once the appropriate personnel action to establish grade and/or pay retention has been successfully processed through PACT and PINE and applied to the employee's database, the retained grade data is recorded on IRIS Program 128, Retained Grade Data. The PRD Code is recorded on IRIS Program 101, Salary Data Record.

Many PINE edit messages have been established for grade and/or pay retention. The following guidelines are provided in order to help prevent possible errors that may occur when certain personnel actions, e.g., promotions, position change, etc., are processed for employees who are in grade and/or pay retention.

Before a promotion, position change, or reassignment is processed for an employee who is currently in grade and/or pay retention, it is very important to determine

the appropriate PRD code that will be used on the processing action. In addition, certain data **must also be established** in the employee's database.

The retained grade data recorded on IRIS Program 128 should display data for the position the employee is **currently** occupying during the period of grade retention and data for the position the employee occupied **prior** to the period of grade retention.

The following tables denote what PRD code(s) can be used when certain nature of action codes (NOAC) are processed for employees whose database salary data record indicates grade and/or pay retention. Also included are definitions for the nature of action codes and remarks codes. A list that follows the table provides definitions of the different PRD Codes.

## Payroll/Personnel Manual Personnel Action Processing System

If the NOAC on the processing action is one of the following and the pay rate determinant (PRD) code on the employee's database salary data record (IRIS Program 101) is:							The PRD Code on the processing action must be one of the following codes and a Grade Retention Expiration Date may or may not be required:						
NOAC	Grade Retention PRD Code of:	Pay Retention PRD Code of:	Grade and Pay Retention PRD Code of:	Grade Retention Special Rate PRD Code of:	Special Rate PRD Code of:	No Grade or Pay Retention or Special Rate PRD Code	Grade Retention Expiration Date Required:	Grade Retention PRD Code of:	Pay Retention PRD Code of:	Grade and Pay Retention PRD Code of:	Grade Retention Special Rate PRD Code of:	Special Rate PRD Code of:	No Grade or Pay Retention or Special Rate PRD Code
702	A or B		U or V	E or F			No		K or 4			6	0
703	A or B		U or V	E or F			No		K or 4			6	0
713 and X37		K, R, 2, 3, or 4			6	0	Yes	A or B		U or V	E or F		
740	A or B	J, K, R, S, 2, 3, or 4	U or V	E or F	6	0	Yes	A or B		U or V	E or F		
740 and X65 X36	A or B		U or V	E or F			No					6	0
740 and X65 X40	A or B		U or V	E or F			No		K, R, 2, 3, or 4				
<b>NOAC Code</b>													
<b>Definition</b>													
702 Promotion													
703 Promotion NTE													
713 Change to Lower Grade													
740 Position Change													
<b>Remarks Code</b>													
<b>Definition</b>													
X36 Grade retention entitlement terminated. No further entitlement to grade or pay retention.													
X37 Employee is entitled to retain grade of (pay plan and grade) through (date).													
X40 Employee is entitled to pay retention.													
X65 Grade retention entitlement terminated.													

**Payroll/Personnel Manual  
Personnel Action Processing System**

If the NOAC on the processing action is one of the following and the pay rate determinant (PRD) code on the employee's database salary data record (IRIS Program 101) is:							The PRD Code on the processing action must be one of the following codes and a Grade Retention Expiration Date may or may not be required:						
NOAC	Grade Retention PRD Code of:	Pay Retention PRD Code of:	Grade and Pay Retention PRD Code of:	Grade Retention Special Rate PRD Code of:	Special Rate PRD Code of:	No Grade or Pay Retention or Special Rate PRD Code	Grade Retention Expiration Date Required:	Grade Retention PRD Code of:	Pay Retention PRD Code of:	Grade and Pay Retention PRD Code of:	Grade Retention Special Rate PRD Code of:	Special Rate PRD Code of:	No Grade or Pay Retention or Special Rate PRD Code
<b>741 and X36</b>	<b>A or B</b>	<b>No</b>	<b>U or V</b>	<b>E or F</b>	<b>No</b>	<b>No</b>	<b>No</b>	<b>No</b>	<b>K, R, 2, 3, or 4</b>	<b>No</b>	<b>No</b>	<b>6</b>	<b>0</b>
<b>741 and X37</b>	<b>A or B</b>	<b>K, R, 2, 3 or 4</b>	<b>U or V</b>	<b>E or F</b>	<b>6</b>	<b>0</b>	<b>Yes</b>	<b>A or B</b>	<b>No</b>	<b>U or V</b>	<b>E or F</b>	<b>No</b>	<b>No</b>
<b>770</b>	<b>A or B</b>	<b>J, K, R, S, 2, 3 or 4</b>	<b>U or V</b>	<b>E or F</b>	<b>6</b>	<b>0</b>	<b>No</b>	<b>A or B</b>	<b>J, K, R, 2, 3, or 4</b>	<b>U or V</b>	<b>E or F</b>	<b>6</b>	<b>0</b>
<b>866</b>	<b>A or B</b>	<b>No</b>	<b>U or V</b>	<b>E or F</b>	<b>No</b>	<b>No</b>	<b>No</b>	<b>No</b>	<b>No</b>	<b>No</b>	<b>No</b>	<b>6</b>	<b>0</b>
<b>866 and X37</b>	<b>A or B</b>	<b>No</b>	<b>U or V</b>	<b>E or F</b>	<b>No</b>	<b>No</b>	<b>Yes</b>	<b>A or B</b>	<b>No</b>	<b>U or V</b>	<b>E or F</b>	<b>No</b>	<b>No</b>
<b>866 and X40</b>	<b>A or B</b>	<b>No</b>	<b>U or V</b>	<b>E or F</b>	<b>No</b>	<b>No</b>	<b>No</b>	<b>No</b>	<b>J, R, S, 2, 3, or 4</b>	<b>No</b>	<b>No</b>	<b>No</b>	<b>No</b>
<b>5XX and X37</b>	<b>A or B</b>	<b>J, K, R, S, 2, 3, or 4</b>	<b>U or V</b>	<b>E or F</b>	<b>6</b>	<b>0</b>	<b>Yes</b>	<b>A or B</b>	<b>No</b>	<b>U or V</b>	<b>E or F</b>	<b>No</b>	<b>No</b>
<b>NOAC Code</b> <b>Definition</b> <b>741</b> Position Change - NTE <b>770</b> Extension of Position Change - NTE <b>866</b> Termination of Grade Retention <b>899</b> Step Adjustment <b>5XX</b> Conversions													
<b>Remarks Code</b> <b>Definition</b> <b>X36</b> Grade retention entitlement terminated. <b>No</b> further entitlement to grade or pay retention. <b>X37</b> Employee is entitled to retain grade of (pay plan and grade) through (date). <b>X40</b> Employee is entitled to pay retention. <b>X65</b> Grade retention entitlement terminated.													

### Pay Rate Determinant (PRD) Codes

#### Code Definition

- 0** This code is used for employees, regardless of pay system, who receive a scheduled rate and for whom none of the following codes apply.
- 2** Saved Rate - Indefinite. Employee is paid, without time limitation, at a pay rate above the maximum rate for the grade when: (a) on or before June 30, 1984, the Foreign Service domestic employee was converted to the General Schedule in accordance with P.L.96-465; or (b) (1) prior to January 11, 1979 (the effective date of section 801 (a) of the Civil Service Reform Act (CSRA) P.L. 95-454,92 Stat.1111), the employee and his or her position had been converted from one pay plan to another under appropriate authority; and (2) the employee was not entitled to either grade or pay retention (codes A, B, J, K, U, or V) on the effective date of the CSRA.
- 3** Retained Pay - Special Rate Adjustment. Employee is receiving retained pay due to: (1) a downward adjustment of a special rate range that left the employee with a pay rate higher than the highest pay rate in the new special rate range; or (2) abolishment of a special rate range that left the employee with a pay rate in excess of the top rate of grade. References: 5 U.S.C. 5363(a)(2) and 5 CFR 536.104(a)(3).
- 4** Saved Rate - Other. Employee is receiving saved rate pay at a pay rate above the regular rate and no other code is applicable. (This code is not applicable for saved rates under the Federal Wage System and is not applicable for saved rates under the General Schedule **except** when authorized by CFR 531.205(a)(3), e.g., for employees promoted from special rate positions to non-special rate positions.)
- 5** Special and Superior Qualifications Rates. For use when PRD codes 6 and 7 are both applicable. **Note:** Code 5 is used only on the action that appointed the employee at a superior qualifications rate within a special rate range; code 6 is used on subsequent actions while the employee continues to receive a special rate of pay.
- 6** Special Rate. Employee is paid at a special rate, established under appropriate authority to recruit well qualified individuals in selected occupations and locations. (If employee is also entitled to a retained grade, use code E or F, as appropriate). References: 5 U.S.C. 5305, 5 U.S.C. 5343(a)(1)(A)ii, and 5 U.S.C. 5343(a)(1)(B)(ii).
- 7** Superior Qualifications Rate. Employee is hired at a pay rate above the minimum rate of the grade. **Note:** 7 is used only on the action that appointed the employee at a superior qualifications rate; code 0 or another appropriate code is used on actions subsequent to the appointment action. References: 5 U.S.C. 5333 and 5 CFR 531.203(b).
- A** Retained Grade - Different Position. Employee retains grade for a 2-year period, but is occupying a different position than that held before the grade reduction. (if employee is also entitled to a special rate in the retained grade, use code E.) References: 5 U.S.C. 5362 and 5 CFR 536.103.
- B** Retained Grade - Same Position. Employee retains grade for a 2-year period and continues to occupy the same position held before the grade reduction. If employee is also entitled to a special rate in the retained grade, use code F. References: 5 U.S.C. 5362 and 5 CFR 536.103.
- E** Retained Grade and Special Rate - Different Position. Employee retains grade for a 2-year period, is entitled to a special rate in the retained grade, but is occupying a different position than that held before the grade reduction.
- F** Retained Grade and Special Rate - Same Position. Employee retains grade for a 2-year period, is entitled to a special rate in the retained grade, but is occupying the same position held before the grade reduction.

**Code Definition**

- J** Retained Pay - Same Position. Employee is receiving a retained rate of pay under 5 U.S.C. 5363(a)(1) or (3), or 5 CFR 536.104 (except S536.104(a)(3), and continues to occupy the same position held before the reduction in grade or other action that otherwise would have resulted in a reduction in basic pay. (**Note:** The employee's pay rate may have been reduced to 150 percent of the maximum rate of basic pay payable for the present grade of the position.)
- K** Retained Pay - Different Position. Employee is receiving a retained rate of pay under 5 U.S.C. 5363(a)(1) or (3), or 5 CFR 536.104 (except S536.104(a)(3), but is currently occupying a different position than that held before the reduction in grade or other action that otherwise would have resulted in a reduction in basic pay. (**Note:** The employee's pay rate may have been reduced to 150 percent of the maximum rate of basic pay payable for the present grade of the position. )
- M** Continued IGA/LEO Pay. Employee continues to receive an adjusted annual rate of pay based on a nationwide or worldwide special salary rate. The employee should be paid the dollar amount of the General Schedule increase at the time of an ECI adjustment. Reference: 5 CFR 531.106 or 5 CFR 531.307.
- R** Retained Pay - SES Removal. A former career Senior Executive Service (SES) employee is receiving a retained rate of pay under 5 U.S.C. 3594 and 5 CFR 359.705 following removal from the SES.
- S** Continued SES Basic Pay. A career Senior Executive Service (SES) employee appointed to a position outside of the SES for which the rate of basic pay is equal to or greater than the rate payable for level V of the Executive Schedule and the employee elected to continue to receive basic pay as if remaining in the SES in accordance with 5 U.S.C. 3392(c) and 5 CFR Part 317, Subpart H.
- T** Below the Minimum Rate. The employee is paid, without time limitation, at a pay rate below the minimum rate for the grade or pay band.
- U** Retained Grade and Pay - Same Position. The employee: (1) has a retained grade; (2) is receiving retained pay; and (3) continues to occupy the same position held immediately before the action that otherwise would have resulted in a reduction in basic pay; i.e., use this code only when J would be appropriate if grade retention were not also applicable. References: 5 U.S.C. 5362, 5 U.S.C. 5363, and CFR Part 536.
- V** Retained Grade and Pay - Different Position. The employee: (1) has a retained grade, (2) is receiving pay retention, and (3) is currently occupying a different position than that held immediately before the action that otherwise would have resulted in a reduction in basic pay; i.e., use this code only when K would be appropriate if grade retention were not also applicable. References: 5 U.S.C. 5362, 5 U.S.C. 5363, and CFR Part 536.

### Additional Information

The following processing instructions are based upon the requirements of the Payroll/Personnel System when certain types of personnel actions are processed for an employee who is in grade retention or grade and pay retention. These edits will apply **only** if the following conditions are present:

- The NOAC on the processing personnel action is one of the NOAC's listed in **Appendix A, [Nature Of Action Codes - 900 Series](#)** and
  - The PRD code on the employee's database salary data record (IRIS Program 101) is A, B, E, F, U, or V and/or the PRD code on the processing action is A, B, E, F, U, or V.
- If any of the PMSO:Key fields (i.e., Dept, Agency, POI, etc.) are changing, the NOAC on the processing action must be a grade retention NOAC or NOAC 790, 800, or 903.
- When the NOAC on the processing action is 770, the following data elements must **not** change:
- The PRD Code, occupied series, and occupied grade, which are recorded on the employee's database salary data record (IRIS Program IR101).
  - The occupied position, which is recorded on the employee's retained grade data record (IRIS Program IR128).
- When the NOAC on the processing action is:
- 790 - Realignment
  - 891 - Merit pay system increase
  - 892 - Quality increase
  - 893 - Within-grade increase
  - 894 - Pay adjustment
  - 888 - Denial of within-grade increase
  - 903 - Chg in PMSO element

the grade of the occupied position recorded on the employee's retained grade data record (IRIS Program IR128) must not change.

The following instructions are for miscellaneous edits that may apply to grade and/or pay retention.

- A personnel action with NOAC 721, Reassignment, or NOAC 713, Change to Lower Grade (without Remarks Code X37) can **not** be processed to:
- place an employee into grade retention
  - place an employee into grade and pay retention
  - terminate grade retention
  - terminate grade and pay retention

In addition, when a cancellation of NOAC 721, Reassignment, or NOAC 713, Change to Lower Grade (without Remarks Code X37), is processed, the employee can **not** be placed into grade retention or grade and pay retention (PRD Code A, B, E, F, U, or V). Refer to the Office of Personnel's (OPM) Guide To Processing Personnel Actions, Table 14G, Rule 2, and Table 14H, Rule 5, for additional information on the exceptions that apply to NOAC 713.

When the pay plan recorded in the employee's database salary data record (IRIS Program IR101) indicates a wage grade pay plan, a personnel action can **not** be processed with a PRD Code of 2, 4, 5, 6, 7, E, F, R, or S.

An employee is entitled to grade retention with a PRD Code of E or F **only if** the geographical location the employee is actually assigned to and the occupational series code of the position the employee is occupying is covered by a special salary rate schedule.

**Note:** If the pay plan on the processing personnel action indicates a change to another pay system, then the employee would be entitled to grade retention with a PRD Code of E or F if the geographical location in which the employee is assigned to and the occupational series series of the position the employee is retaining is covered by a special salary rate schedule.

## Awards

All awards are entered through PACT using the appropriate award NOAC and authority code(s). The NOAC and authority code(s) entered in PACT generate a screen displaying only those data elements required for the specific type of award. The various types of awards entered through PACT are:

- individual/group awards for suggestions/inventions
- quality increases
- individual/group spot awards
- individual/group time off awards
- travel incentive awards (foreign and domestic)
- foreign language awards

The amount of a spot award is limited to a minimum of \$25 and a maximum amount of \$500. Agencies may disburse cash from imprest funds to pay these awards at the time the special act or service is performed.

### Time Off Awards

A time off award is an excused absence that may be granted to an employee without charge to leave or loss of pay. Time off awards promote productivity and creativity by rewarding contributions to the quality, efficiency, or economy of Government operations.

A full-time employee may be granted up to 40 hours of time off per award, but no more than 80 hours of time off may be granted during a leave year.

A part-time employee or an employee with an uncommon tour of duty may be granted time off up to one-quarter of their biweekly scheduled tour per award, and up to one-half of their biweekly scheduled tour per leave year. The amount of time that can be granted for a single contribution is one-half of the maximum that may be granted during the leave year. **Note:** Intermittent and Senior Executive Service (SES) employees are not eligible to receive time off awards.

A time off award must be scheduled and, in most cases, used within 1 year after the effective date of the award. The award is effective the first pay period following approval. After the 1 year period, any unused time off will be forfeited.

Unused time off hours cannot be converted to a cash payment upon separation from Federal service. Time off awards cannot be transferred when an employee transfers between Federal agencies.

If a time off award was processed with an incorrect number of hours, a correction to the time off award must be processed.

If the number of hours on a time off award originally processed was less than the number of hours that should have been granted, and the hours already used do not exceed the amount that should have been granted, or no hours were used, process a correction action in PACT. Enter the correct number of hours in the Base Salary and Verify Salary fields. A corrected T&A or correction to TINQ is not required.

If the number of hours on the time off award originally processed was more than the number of hours that should have been granted and the number of hours already used exceed the amount granted:

(1) process a correction action in PACT and enter the correct number of hours in the Base Salary and Verify Salary fields.

(2) process a corrected T&A to change the number of hours recorded under TC66, Prefix 61, to paid leave, absence without pay (AWOP), or regular time; or, adjust the time off hours used in TINQ Program TI008, and change the incorrect number of hours charged to TC66, Prefix 1, to the appropriate leave in the applicable TINQ program.

If a time off award must be canceled and no time off hours were used, process a cancellation action in PACT and enter zeros in the Base Salary and Verify Salary fields.

If a time off award must be canceled and time off hours were used:

(1) enter zeros in the Time Off Awards Used field in TI008 and adjust the leave record in the appropriate TINQ program for which the leave will be charged (or process a corrected T&A and change the time off hours to paid leave, AWOP, or regular time).

(2) process a cancellation action in PACT and enter zeros in the Base Salary and Verify Salary fields.

## **Retention Allowance**

A retention allowance is an incentive allowance offered to retain needed employees who would otherwise separate from Federal service. The allowance is a percentage of scheduled salary not to exceed 25 percent.

If an employee is eligible to receive a retention allowance, process a retention allowance personnel action in PACT and enter the allowance percent in the Percent field. (If the employee is eligible for a retention allowance and supervisory differential, process two separate personnel actions in PACT.)

To change a retention percent, process a retention allowance personnel action in PACT and enter the new percent in the Percent field.

To correct a retention percent, process a correction to the retention personnel action in PACT if payment has been made, and enter the correct percent in the Allowance Pct field. If the percentage rate exceeded or was less than the rate intended, the Payroll/Personnel System will automatically collect or compensate for the retroactive period.

To cancel a retention percent, process a cancellation of the retention allowance in PACT if payment has been made. The Payroll/Personnel System will automatically collect for the indebtedness.

### Supervisory Differential

A supervisory differential is a biweekly pay differential for full-time or part-time General Schedule employees who supervise one or more civilian employees in positions other than General Schedule.

If an employee is eligible for a supervisory differential, the Supervisory Code in the employee's PMSO Master record must be coded 2, Supervisor or Manager, before the personnel action can be processed.

Process the supervisory differential personnel action in PACT and enter the supervisory percent in the Supvy Pct field. (If the employee is eligible for supervisory differential and retention allowance, process two separate personnel actions in PACT).

To change a supervisory differential percent, process a supervisory differential personnel action in PACT and enter the percent in the Percent field.

To correct a supervisory differential percent, process a correction to the supervisory differential personnel action in PACT if payment has been made, and enter the correct percent in the Supvy Pct field. If the percentage rate exceeded or was less than the rate intended, the Payroll/Personnel System will automatically collect or compensate for the retroactive period.

To cancel a retention percent, process a cancellation of the supervisory differential in PACT if payment has been made. The Payroll/Personnel System will automatically collect for the indebtedness.

### Recruitment Bonus

A recruitment bonus is an incentive for recruiting General Schedule full-time or part-time employees. This bonus is a one-time payment of up to 25 percent of the employee's annual basic pay, and may be offered to newly-appointed employees or individuals to whom a written offer of employment has been made by the agency. This incentive may be used only if the absence of such a bonus would make it difficult to fill the position with a highly qualified candidate.

If the employee is eligible to receive a recruitment bonus, process a recruitment bonus personnel action in

PACT and enter the bonus amount in the Bonus Amount field.

To correct a recruitment bonus amount, process a correction to the bonus recruitment personnel action in PACT if payment has been made, and enter the correct amount in the Recruit Bonus field. If the bonus amount exceeded or was less than the amount approved, submit Form AD-343 to collect or compensate.

To cancel a recruitment bonus, process a cancellation of the recruitment bonus personnel action in PACT if payment has been made. Submit Form AD-343 to collect for the indebtedness.

## Relocation Bonus

A relocation bonus is an incentive offered to full-time or part-time General Schedule employees to accept positions in different commuting areas. This relocation bonus is a one-time payment of up to 25 percent of annual basic pay and may be used only if the absence of such an incentive would make it difficult to fill the position with a highly qualified candidate.

If the employee is eligible to receive a relocation bonus,

process a relocation bonus personnel action in PACT and enter the bonus amount in the Bonus Amount field.

- To correct a relocation bonus amount, process a correction to the relocation bonus personnel action in PACT if payment has been made, and enter the correct amount in the Reloc Bonus field. If the bonus amount exceeded or was less than the amount approved, submit Form AD-343 to collect or compensate.
- To cancel a recruitment bonus, process a cancellation of the recruitment bonus personnel action in PACT. Submit Form AD-343 to collect for the indebtedness.

### Separation Incentive

A separation incentive is a one-time payment offered to employees as an incentive to retire or resign from Federal service. (**Note:** A separation incentive cannot be processed for a deceased employee or an employee in an active pay status. The employee's pay status can be verified by viewing the Separation-Accession Type field on IRIS Program 123, Personnel Supplements. If this field is other than **I** (separated), process the separation personnel action first and then process the separation incentive.)

If the employee is eligible to receive a separation incentive, process a separation incentive personnel action in

PACT and enter the amount of the separation incentive in the Amount Of Award and Verify Amount Of Award fields. **Note:** The effective date of the separation incentive personnel action must be equal to, or later than, the effective date of the separation personnel action.

To correct a separation incentive, process a correction to the separation incentive personnel action in PACT. **Note:** The amount of a separation incentive award cannot be corrected or changed in PACT. Submit Form AD-343 if the amount of the award exceeded or was less than the amount originally approved.

To cancel a separation incentive, process a cancellation of the separation incentive personnel action in PACT. Submit Form AD-343 to collect for the indebtedness.

## AUO

Administratively Uncontrollable Overtime (AUO) is premium pay on an annual basis for hours of duty that cannot be administratively controlled and which require substantial amounts of irregular, unscheduled overtime duty.

### Establish And Begin AUO

To establish AUO entitlement for an employee, process a personnel action in PACT, EPIC, or FESI with NOAC 818, Administratively Uncontrollable Overtime, and also enter the appropriate code in the Special Employee Code field.

To begin AUO, enter the hours and/or percentage rate on the T&A in the AUO Hours/Percent fields.

### Change AUO

To change the AUO hours and/or percentage rate, complete all of the AUO Hours/Percent fields on the T&A to reflect the new hours and/or percentage. Enter the change on the T&A for the pay period in which the change is effective.

The Payroll/Personnel System will generate a personnel action with NOAC 818, and also produce an SF-50-B to document the change.

### Correct AUO

To retroactively begin AUO or to correct AUO hours and/or percentage rate, process a corrected T&A for each pay period that the correction applies. Enter the correct hours/percent in the AUO Hours/Percent fields or enter **99** in the % Premium field to terminate AUO.

The Payroll/Personnel System will *not* generate a personnel action with NOAC 818 for corrected T&A's for prior pay periods. If the employee is due AUO for a prior pay period requiring a corrected T&A, the employee

will be paid AUO; however, the personnel action will not be generated.

**Note:** If the corrected T&A is starting, changing, or correcting AUO hours and/or percentage rate, the employee's database dates & misc sal/pers data record (IRIS Program 102) must be coded *eligible* for the pay period of the corrected T&A.

### Temporary Termination of AUO

To temporarily end AUO, enter **99** in the % Premium field on the T&A (e.g., to temporarily end the AUO in Pay Period 15, enter **99** on the Pay Period 15 T&A). This signals the system to stop AUO immediately.

The Payroll/Personnel System will generate a personnel action with NOAC 818, and also produce an SF-50-B to document the termination.

### Resume AUO After Temporary Termination

AUO is resumed for the employee when a valid AUO percentage is entered in the % Premium field on the T&A, and the applicable hours in the Standby/AUO/Avail Pay 1st Week and 2nd Week fields are entered.

The Payroll/Personnel System will generate another personnel action with NOAC 818, and also produce an SF-50-B to document the change once AUO is resumed.

### Permanent Termination of AUO

To permanently terminate AUO entitlement, process in PACT, EPIC, or FESI a personnel action with NOAC 818, and enter **00** in the Special Employee Code field.

Submit a T&A for the effective pay period and enter **99** in the % Premium field.

**Note:** If the T&A is terminating entitlement by deleting the AUO hours and percentage rate, the employee's database dates and misc sal/pers data record (IRIS Program 102) must be coded *ineligible* for the pay period of the corrected T&A.

## Corrections

A correction personnel action changes data processed incorrectly or omitted on an earlier action. Correction actions are generally retroactive and relate back to the effective date of the personnel action being corrected, i.e., the effective date of a correction action is usually the same date as the last action processed.

Listed below are examples that would require the processing of a correction action.

- The FEHB coverage code on a previous personnel action was incorrect.
- A personnel action was processed with an incorrect effective date.

Several factors should be considered before a correction action is processed.

□ The Information/Research Inquiry System (IRIS) should be queried to review the employee's database personnel history record before a correction is processed. Plan the processing sequence of the action(s) and determine if any changes to PMSO must be processed. IRIS programs used to verify data recorded in the employee's database are:

- IRIS Program 101, Salary Data, displays current salary and position data.
- IRIS Program 122, SF-50B Data Elements, displays SF-50 data elements for the last personnel action processed.
- IRIS Program 125, Personnel Actions Summary, displays personnel actions processed during the current and prior fiscal years.
- IRIS Program 525, PERHIS Personnel Actions Summary, displays a chronological listing of all personnel actions processed. This program is very important when canceling and restoring actions.

□ It is helpful to draft the correction personnel action(s) and an outline of the processing sequence of the actions before the actual correction process begins.

In addition to reviewing and researching data in the employee's OPF and database records, adhering to the following special considerations will minimize errors that may occur when a correction personnel action is processed:

- Corrections are processed to change and/or correct Central Personnel Data File (CPDF) data reported to OPM on the most recent personnel action processed.

- The authentication date of a correction action must be later than the authentication date of the last action recorded on the employee's database.
- Corrections must be processed using NOAC 002, Correction, which does not require a legal authority code.

The following examples are representative of the different types of situations that normally require the processing of a correction personnel action. The processing instructions provided with each example are based upon the processing requirements of the Payroll/Personnel System. These instructions may be supplemented with additional instructions authorized or required by an individual agency.

### NOACs That Must Be Corrected Without Canceling Any Other Actions

The employee's database PERHIS personnel actions summary record (IRIS Program 525) displays the current and all prior official actions processed for an employee. Generally, if a correction must be made to an action that is not the last action recorded on the employee's database, all actions with a later effective date must be canceled before the correction action can be processed. (For additional information, see **Cancellations**). However, to correct any of the following NOACs, which are displayed on IRIS Program 525, along with all other official actions processed, do not cancel any personnel action(s) that may have been processed with a later effective date:

NOAC	Description
730-732	Details
815	Recruitment Bonus
816	Relocation Bonus
825	Separation Incentive
840-841	Cash Awards
842-843	Invention/Suggestion Awards
844	Foreign Language Awards
845	Travel Incentive Awards
846-847	Time Off Awards
922-924	Details
970	Foreign Language Bonus
982	Recruitment Allowance (USDA only)
983	Retention Allowance (USDA only)

For example, a correction must be processed for a time off award. IRIS Program 525 displays the following NOAC's processed for the employee:

Pay Period/ Year	NOAC/ Description	Effective Date
25/01	780/Name Change	12/16/01
24/01	846/Time Off Award	12/02/01

The time off award was processed in Pay Period 24 with 10 hours. The name change was processed in Pay Period 25. The time off award should have been for 15 hours. Process a correction to the time off award (002/846) without canceling the name change.

**Note:** Whenever a correction action is processed in PACT, the PACT menu is displayed and must be completed first. After the key data elements are completed on the PACT menu and the [Enter] key is depressed, Document Type 063, Personnel Action Input, screens are displayed. Document Type 063 is comprised of three screens containing nearly all of the personnel data elements. The [PF7], [PF8], and [PF9] keys are used to move between screens 1, 2, and 3. See [Function Keys](#) in this chapter for additional information.

### Correcting The Last Action Recorded On The Database

Many corrections are processed by correcting the last action recorded on the employee's database personnel actions summary record (IRIS Program 125). For example, a review of the employee's OPF reveals an incorrect FEGLI coverage code was recorded on the original FEGLI change personnel action.

IRIS Program 125 displays the following NOAC's processed for the employee:

Pay Period/ Year	NOAC/ Description	Effective Date
25/01	881/DPM FEGLI Change	12/16/01
24/01	841/V3F Group Spot Award	12/02/01

The FEGLI change processed in Pay Period 25 is the last action displayed on IRIS Program 125. To correct the FEGLI code, process a correction to the FEGLI action in PACT. Enter **002** in the PACT menu 1st NOA Code field and enter **881** in the 2nd NOA Code field and **DPM** in the 2A Auth Code field. Press [Enter]. When the first Document Type 063 screen is displayed, enter the correct FEGLI code in the FEGLI Coverage field.

Whenever a correction action (e.g., 002/FEGLI Change) results in a change to an employee's salary, the

Payroll/Personnel System will automatically make retroactive adjustments for the current and twenty-five prior pay periods, provided T&A's have been submitted for the pay periods involved. For adjustment periods that exceed twenty-five prior pay periods, submit an AD-343 to NFC for overpayment or underpayment. See the Nonautomated Processing chapter for additional information.

### Correcting The NOAC Of The Last Action Recorded On The Database

A review of the employee's OPF reveals that a correction must be processed because the wrong NOAC for an employee's career-conditional appointment was entered when the accession action was processed.

IRIS Program 125 displays the following NOAC processed for the employee:

Pay Period/ Year	NOAC/ Description	Effective Date
25/01	101/ACM Career-Cond Appt	12/16/01

The accession personnel action is the only action displayed on IRIS Program 125. To correct the NOAC, process a correction to the accession action in PACT. Enter **002** in the PACT menu 1st NOA Code field and enter the correct NOAC in the 2nd NOA Code field and the authority code (if applicable) in the 2A Auth Code field. Press [Enter]. When the first Document Type 063 screen is displayed, enter the incorrect NOAC in the Correction-Previous Action A: (NOA-Auth-Auth) field.

### Correcting The Effective Date Of The Last Action Recorded On The Database

A review of the employee's OPF reveals a correction must be processed because the wrong effective date was entered when the employee's promotion-NTE action was processed.

IRIS Program 125 displays the following NOAC processed for the employee:

Pay Period/ Year	NOAC/ Description	Effective Date
25/01	703/N2M Promotion-NTE	12/16/01
24/01	790/UNM Realignment	12/02/01

The promotion-NTE is the last action displayed on IRIS Program 125. To correct the effective date of the promotion-NTE, process a correction to the promotion-NTE in PACT. Enter **002** in the PACT menu 1st NOA Code field and enter **703** in the 2nd NOA Code field and **N2M**

in the 2A Auth Code field. Press [Enter]. When the first Document Type 063 screen is displayed, enter the incorrect effective date in the Correction-Previous Action B: (DATE) field.

Whenever a correction action (e.g., 002/Promotion-NTE) is correcting the effective date, which may result in an adjustment to the employee's salary, the Payroll/

Personnel System will automatically make any retroactive adjustments for the current and twenty-five prior pay periods, provided T&A's have been submitted for the pay periods involved. For adjustment periods that exceed twenty-five prior pay periods, submit an AD-343 to NFC for overpayment or underpayment. See the Nonautomated Processing chapter for additional information.

## Cancellations

A cancellation rescinds an earlier action that: (1) was improper, (2) was proper but contains references to an improper action, or (3) contains remarks codes that are inappropriate or erroneous and should not have been processed. Examples of situations in which a cancellation may be necessary are:

- To remove a previous personnel action which was improper or should not have been processed (e.g., an erroneous separation)
- An appointment is void because the employee deliberately misrepresented or falsified a material matter.
- To process or correct a personnel action with an effective date earlier than the last official personnel action processed

Several factors should be considered before a cancellation action is processed.

□ The Information/Research Inquiry System (IRIS) should be queried to review the employee's database personnel history before a cancellation(s) is processed. Plan the processing sequence of the action(s) and determine if changes to PMSO must be processed. IRIS programs used to verify data recorded in the employee's database are:

- IRIS Program 101, Salary Data, displays current salary and position data.
- IRIS Program 122, SF-50B Data Elements, displays SF-50 data elements for the last personnel action processed.
- IRIS Program 125, Personnel Actions Summary, displays personnel actions processed during the current and prior fiscal years.
- IRIS Program 525, PERHIS Personnel Actions Summary, displays a chronological listing of all personnel actions processed. This program is very important when canceling and restoring actions.

□ Draft the cancellation personnel action(s), and an outline of the processing sequence of the actions before the actual cancellation process begins.

In addition to reviewing and researching data in the employee's OPF and database records, adhering to the following special considerations will minimize errors:

- The cancellation of previous actions will take effect only if the actions are canceled in the reverse order in which they were originally applied to the employee's database.
- The nature of action code (NOAC), authority code, and effective date of most cancellation actions must match exactly to the NOAC, authority code, and effective date in the employee's database record for each recorded action.
- Whenever a cancellation of a personnel action is processed, the input document should contain the data needed to restore the information in the employee's database. For example, when a cancellation of a name change is being processed, the employee's *former name* must be recorded on this action.
- When a cancellation to a position change (reassignment, change to lower grade, etc.) is processed, a *vacant and active* individual position number must exist in PMSO. It may be necessary to establish a temporary individual position if the employee's former position is no longer vacant or was abolished. For example:
  - (1) A cancellation to a promotion must be processed, restoring the employee to the position occupied *prior* to the promotion.
  - (2) The individual position for the employee's former grade is now occupied.
  - (3) A temporary individual position number for the employee's grade must be established in PMSO in order to process the cancellation action.
- If a temporary individual position number must be established in order to process a cancellation action, restore an employee to a former position, and reprocess the action that was canceled, the Classification Action Code field on the personnel action must be recorded as follows:
  - (1) On the cancellation action, enter *0* to remove the employee from the current position and leave that position vacant and active.
  - (2) On the restoration action, enter *1* to remove the employee from the temporary position and abolish the temporary position.

The employee's database PERHIS personnel actions summary record (IRIS Program 525) displays the current and all prior official actions processed for an employee. The following NOACs displayed on IRIS Program 525 *cannot be canceled* in order to *modify or cancel a previously processed personnel action*:

NOAC	Description
730-732	Details
815	Recruitment Bonus
816	Relocation Bonus
825	Separation Incentive
840-841	Cash Awards
842-843	Invention/Suggestion Awards
844	Foreign Language Awards
845	Travel Incentive Awards
846-847	Time Off Awards
922-924	Details
970	Foreign Language Bonus
982	Recruitment Allowance (USDA only)
983	Retention Allowance (USDA only)

If a cancellation to any of the NOAC(s) listed above must be processed, *do not cancel any official personnel actions processed after the action*. Enter the cancellation of the NOAC in PACT, and do not enter any data in the Previous NOAC or Previous Effective Date fields.

For example, a review of the employee's OPF indicates that a cash award, processed in error for an employee, must be canceled. IRIS Program 525 displays the following NOACs processed for the employee:

Pay Period/ Year	NOAC/ Description	Effective Date
26/01	703/N2M Promotion-NTE	12/30/01
25/01	780 Name Change	12/16/01
24/01	840 Cash Award	12/02/01
23/01	790 Realignment	11/18/01

The processing sequence would be as follows:

Cancel	Effective	Previous NOAC	Effective
840	12/02/01	None	None

Process a cancellation of the cash award in PACT. Enter **001** in the PACT menu 1st NOA Code field and the authority code for the cancellation (if applicable) in the 1A Auth Code field.

Enter **877** in the 2nd NOA Code field and enter the authority code that was furnished on the cash award action in the 2A Auth Code field. Press [Enter].

When the first Document Type 063 screen is displayed, enter **12/02/01** in the Effective Date field. Do not enter any data in the Correction-Previous Action A: (NOA-Auth-Auth) or B: (DATE) fields.

### Canceling An Action That Is Not The Last Action Recorded On The Database

A review of the employee's OPF reveals that the step was incorrect when the promotion was processed, and a correction to the promotion must be processed.

A review of IRIS Program 125 displays the following NOACs processed for the employee:

Pay Period/ Year	NOAC/ Description	Effective Date
26/01	780 Name Change	12/30/01
25/01	840 Cash Award	12/16/01
24/01	790 Realignment	12/02/01
23/01	702 Promotion	11/18/01

Because NOAC 877 cannot be canceled to correct or modify a previously processed action, a draft of the processing sequence would be as follows:

#### Step 1

Cancel	Effective	Previous NOAC	Effective
780	12/30/01	790	12/02/01

Process a cancellation to the Name Change in PACT. Enter **001** in the PACT menu 1st NOA Code field and the authority code (if applicable) in the 1A Auth Code field.

Enter **780** in the 2nd NOA Code field and enter the authority code that was furnished on the name change action in the 2A Auth Code field. Press [Enter].

When the first Document Type 063 screen is displayed, enter **790** and the authority recorded on the original realignment action in the Correction-Previous Action A: (NOA-Auth-Auth) field. Enter **12/02/01**, which is the effective date of the realignment, in the Correction-Previous Action B: (DATE) field. Enter **12/30/01**, which was the effective date of the name change, in the Effective Date field.

**Note:** Enter the employee's previous name on this cancellation action because the name change action is being canceled.

#### Step 2

Cancel	Effective	Previous NOAC	Effective
790	12/02/01	702	11/18/01

Process a cancellation to the Realignment in PACT. Enter **001** in the PACT menu 1st NOA Code field and the authority code (if applicable) in the 1A Auth Code field.

Enter **790** in the 2nd NOA Code field and enter the authority code that was used for the realignment action in the 2A Auth Code field. Press [Enter].

When the first Document Type 063 screen is displayed, enter **702** and the authority used for the promotion

action in the Correction-Previous Action A: (NOA-Auth-Auth) field. Enter **11/18/01**, which was the effective date of the promotion, in the Correction-Previous Action B: (DATE) field. Enter **12/02/01**, which was the effective date of the realignment, in the Effective Date field.

**Note:** Also enter data in those fields that will be affected as a result of cancelling the realignment. The realignment action is being canceled, so any data that was changed when the realignment was processed must be changed back to reflect the prior status.

In addition, changes may also have be processed in PMSO. The promotion action is being canceled, therefore a vacant and active position for the employee's former grade must be available in PMSO. This data must be present on the processing action that is canceling the promotion.

**Step 3**

<b>Correct</b>	<b>Effective</b>
702	11/18/01

Process the correction to the promotion action in PACT. Enter **002** in the PACT menu 1st NOA Code field and the applicable authority code for the correction action in the 1A Auth Code field.

Enter **702** in the 2nd NOA Code field and enter the authority code that was furnished on the original promotion action in the 2A Auth Code field. Press [Enter].

When the first Document Type 063 screen is displayed, enter **11/18/01** in the Effective Date field. Also enter the data that is applicable to correcting the promotion action, i.e., PMSO data and correct step.

**Step 4**

Reenter both the realignment and the name change actions in PACT to restore these actions to the employee's database.

<b>Reprocess</b>	<b>Effective</b>
790	12/02/01

**Step 5**

<b>Reprocess</b>	<b>Effective</b>
780	12/30/01

**Canceling An Accession Personnel Action**

When an accession personnel action must be canceled during the processing pay period and PAYE has not been

processed for that pay period, the PEP51 program should be used to delete the personnel action and all related payroll actions from the database. For detailed information, see the **PEP51 procedure**.

PEP51 cannot be used to cancel an accession action that was processed in an earlier pay period. For example, an accession action was processed in a prior pay period, but the employee never reported for duty.

A review of IRIS Program 125 displays the following NOACs processed for the employee:

<b>Pay Period/ Year</b>	<b>NOAC/ Description</b>	<b>Effective Date</b>
25/01	171 Exc Appt-NTE	12/16/01

A draft of the processing sequence would be as follows:

<b>Cancel</b>	<b>Effective</b>
171	12/16/01

Process the cancellation of the accession in PACT. Enter **010** (Separation-Cancel Accession) in the PACT menu 1st NOA Code field; no legal authority code is required for NOAC 010.

Enter **171** in the 2nd NOA Code field and enter the authority code that was furnished on the original accession action in the 2A Auth Code field. Press [Enter].

When the first Document Type 063 screen is displayed, enter the effective date of the accession action in the Effective Date field, and complete any other fields as required.

**Canceling A Separation Action For An Employee Who Is Still On The Rolls**

If it is determined that a cancellation to a separation must be processed, e.g., a separation action was processed for the wrong employee, a retroactive restoration must be processed, etc., several factors must be considered before the separation action can be canceled.

- If a separated employee's final T&A and lump sum payment (if applicable) were processed along with the separation action, the employee's database record is maintained in the Payroll/Personnel System for at least six complete pay periods following the one in which the separation action was processed. The employee's database records are then moved to the Payroll/Personnel history files, i.e., IRIS Program 525, PERHIS Personnel Actions Summary.
- If the final T&A and/or lump sum payment (if applicable) has not been processed for a separated employee, the employee's database record is maintained in the Payroll/Personnel System until these are processed.

To cancel a separation action for an employee whose database record is still maintained in the Payroll/Personnel System, the processing sequence would be as follows:

For example, IRIS Program 525 displays the following NOACs processed for the employee:

Pay Period/ Year	NOAC/ Description	Effective Date
25/01	357 Termination	12/16/01
24/01	780 Name Change	12/02/01
23/01	790 Realignment	11/18/01

A draft of the processing sequence would be as follows:

**Step 1**

Cancel	Effective	Previous NOAC	Effective
357	12/16/01	780	12/02/01

Process the cancellation of the separation in PACT. Enter **001** in the PACT menu 1st NOA Code field and the authority code (if applicable) in the 1A Auth Code field.

Enter **357** in the 2nd NOA Code field and enter the authority code that was furnished on the original separation action in the 2A Auth Code field. Press [Enter].

When the first Document Type 063 screen is displayed, enter **780** and the authority recorded on the name change action in the Correction-Previous Action A: (NOA-Auth-Auth) field. Enter **12/02/01**, which was the effective date recorded on the name change action, in the Correction-Previous Action B: (DATE) field. Enter **12/16/01**, which was the effective date of the separation action, in the Effective Date field.

Enter data in those fields that may be affected as a result of canceling the separation.

**Canceling A Separation Action For An Employee Who Is No Longer On The Rolls**

To cancel a separation action for an employee whose database record is no longer maintained in the Payroll/Per-

sonnel System and moved to the history file (IRIS Program 525), the processing sequence would be as follows:

For example, a review of the employee's OPF or IRIS Program 525 displays the following NOACs processed for the employee:

Pay Period/ Year	NOAC/ Description	Effective Date
25/01	357 Termination	12/16/01
24/01	780 Name Change	12/02/01
23/01	790 Realignment	11/18/01

A draft of the processing sequence would be as follows:

**Step 1**

Cancel	Effective	Previous NOAC	Effective
357	12/16/01	780	12/02/01

Process the cancellation of the separation in PACT. Enter **001** in the PACT menu 1st NOA Code field and the authority code (if applicable) in the 1A Auth Code field.

Enter **357** in the 2nd NOA Code field and enter the authority code that was furnished on the original separation action in the 2A Auth Code field. Press [Enter].

When the first Document Type 063 screen is displayed, enter **780** and the authority recorded on the name change action in the Correction-Previous Action A: (NOA-Auth-Auth) field. Enter **12/02/01**, which was the effective date recorded on the name change action, in the Correction-Previous Action B: (DATE) field. Enter **12/16/01**, which was the effective date of the separation action, in the Effective Date field.

Because the employee no longer has a database record in the Payroll/Personnel System, this cancellation action must be completed just like an accession action.

**Note:** All payroll/personnel related documents must be entered in PRES to reestablish the employee's database record in the Payroll/Personnel System.

## Updates

An update, or unofficial action, is used to add, correct, or modify data that is not submitted to the CPDF and is of interest to an agency/department only. Updates do not require official notification to the employee or OPM, and an SF-50-B is not produced.

To add an update in PACT, complete the following fields on the PACT menu (for instructions, see [Key Fields](#)):

- SSNO
- Dept/Agcy

- POI
- Eff Pay Period
- Auth Date
- Function
- Oper Initials

Key in **Y** in the Update Action Code field and press [Enter]. The PACT Update Action screen is displayed. Refer to [PACT Data Elements](#) in this chapter for completion instructions for the fields displayed on this screen.

## Separations

The instructions in this section are based upon OPM regulations, public laws, etc., and the processing requirements of the U.S. Department of Agriculture's Payroll/Personnel System. Departments and non-Federal agencies not governed by OPM may supplement this section with additional instructions authorized by their individual department/agency.

A separation action removes an employee from the rolls of a Department, whether by termination, discharge (removal), resignation, retirement, or death.

When a separation action is processed, the legal authority to be entered on the action will depend on whether or not the action is being taken under civil service laws or regulation, under agency procedures that are similar or equivalent to those required under civil service laws or regulations, or under other procedures. The agency personnel specialist who approves the separation action is responsible for determining the correct authority and remarks codes.

Documenting the separation action with the appropriate remarks code(s) should also be considered during the preparation of the action. Remarks codes are used to determine future employment eligibility and eligibility for various benefits, such as unemployment compensation, entitlement to continue health benefits, etc.

There are certain remarks codes that, because of OPM regulations or internal processing use only, do not appear on the employee's or personnel officer's copy of the SF-50-B. Remarks codes are printed on the SF-50-B in the order in which they are entered in PACT.

The following section contains descriptions of separation actions and special processing instructions for some separation actions. See [PACT Data Elements](#) in this chapter for data entry and general processing instructions for the individual PACT data elements.

All separations are entered through PACT using the appropriate NOAC and authority code(s). The NOAC and authority code(s) entered in PACT generate a screen displaying only those data elements required for the specific type of separation. The various types of separations entered through PACT are:

- terminations
- discharges (or removals)
- resignations
- resignations - ILIA
- retirements
- deaths

A termination action is a separation action which is a nondisciplinary action initiated by the agency and is not the fault of the employee, i.e., expiration of appointment limitations, termination due to lack of work or funds, etc.

A discharge (or removal) separation action is initiated by the agency to remove an employee from the rolls, i.e., because of misconduct, false statements at the time of appointment, unacceptable performance, etc.

A resignation separation action is initiated by the employee to leave the organization, i.e., an employee elects to resign because: the job function is moved outside the employee's commuting area, the appointment does not afford appeal rights, etc.

A resignation - ILIA (in lieu of involuntary action) is an involuntary separation action that may qualify an employee for a discontinued service retirement and is initiated by the Department/agency against the will and without the consent of the employee.

A retirement separation action can be initiated (1) by an employee with retirement coverage who, after meeting the age and service requirements, voluntarily elects to retire, or (2) by the agency to separate an employee with CSRS or FERS retirement coverage because of a reduction in force (RIF), reorganization, transfer of functions, etc.

### Death Claim Separation

A death claim separation action is processed to settle the accounts of a deceased employee as required by 5 USC 5581-5584. After receipt of proper documentation, OFM/NFC will settle and pay claims for unpaid compensation due a deceased employee as quickly as possible.

- Unpaid compensation is the pay and allowances due a deceased employee, that includes, but is not limited to, the following:
  - Per diem in lieu of subsistence, mileage, and amounts due for reimbursement of travel expenses, including incidental and other expenses which are included in the reimbursement amount
  - Allowances due to a change in the employee's official duty station
  - Quarters, cost of living allowance, and overtime or premium pay
  - Amounts due for payment of cash award for an employee suggestion
  - Refund amount of pay deductions for U.S. Savings bonds
  - Payment of accumulated annual leave
  - Salary payments not received before the employee's death

- Amounts for undeliverable checks returned to the Government because of the employee's death
- Any retroactive pay under 5 USC 5344(a)(2).

### Order Of Precedence For Payment Of Unpaid Compensation

□ Payment of any unpaid compensation due an employee at the time of death shall be paid to the survivor(s) in the following order of precedence:

- (1) to the beneficiary or beneficiaries listed on the SF-1152, Designation of Beneficiary, Unpaid Compensation of Deceased Civilian Employee.
- (2) if there is no designated beneficiary, to the surviving spouse of the employee.
- (3) to the child or children of the employee and descendants of any deceased children by representation.

### Types Of Payment For Death Benefits

□ Two types of payments are made for death benefits: survivor annuity and lump sum payment.

- A survivor annuity is payable upon an employee's death to a spouse and dependent children. The employee must have (1) completed at least 18 months of civilian service, and (2) died while employed in a position subject to the Civil Service Retirement System (CSRS) or Federal Employees Retirement System (FERS).
- A lump sum payment is payable upon the employee's death if there is no spouse or dependent children entitled to survivor annuity, or, if survivor annuity is payable, after the right of the last person entitled has terminated.

### Processing A Death Claim Separation Action

The following guidelines are provided to ensure the accurate and timely processing of a death claim.

□ Upon notification of the employee's death, the agency should notify OFM/NFC immediately through telecommunications (telefax, Electronic Mail System, etc.). This notification should include:

- the employee's name
- social security number
- date of death
- Department, agency, and personnel office codes

□ The agency should then determine if any unpaid compensation is due the deceased employee. If any amounts are due, certain documents should be secured as promptly as possible to assure payment of all benefits which may be due.

□ The following forms constitute a death claim package and should be submitted to OFM/NFC for processing:

- SF-2800, Application of Death Benefits, if the employee was covered by the Civil Service Retirement System (CSRS). Before a widow's or children's annuity benefits can begin, or a refund of the amount to the deceased employee's credit to the civil service retirement fund can be made, this form must be executed. A certified copy of the death certificate is also needed.
- SF-3104, Application for Death Benefits, if the employee was covered by the Federal Employees Retirement System (FERS). Before any benefits can begin, this form must be executed and a certified copy of the death certificate is also needed.
- SF-1153, Claim of Designated Beneficiary and/or Spouse for Unpaid Compensation of Deceased Civilian Employees, if any payments for salary, unused annual leave, refund of bond deductions, etc., are due the employee.
- SF-1055, Claim Against the United States for Amounts Due in the Case of a Deceased Creditor, when the designated beneficiary is the estate of the deceased.
- SF-1152, Designation of Beneficiary, Unpaid Compensation of Deceased Civilian Employee, if this form was completed and filed by the employee at the time of hire.
- SF-2810, Notice of Change in Health Benefits Enrollment, if the surviving spouse is eligible to convert to a non-group health benefits contract.
- Form FE-6, Claim for Death Benefits, Federal Employees Group Life Insurance, if the deceased employee had life insurance coverage.
- SF-2801/SF-3107-1, Certified Summary of Federal Service.
- SF-2803, Application to Make Deposit or Redeposit/SF-3108, Application to Make Service Credit Payment for Civilian Service
- SF-2806/SF-3100, Individual Retirement Record
- AD-343, Payroll Action Request
- AD-581, Lump Sum Leave or Compensatory Time Payments

The separation personnel action should be entered in PACT. A screen print of this personnel action should be included in the death claim package.

**Note:** A printout (screen print) of the Time and Attendance Report (T&A) should be submitted immediately upon receiving notification of the employee's death. Complete the T&A showing the duty and leave status of the employee through the date of death. For detailed information, see the T&A procedure.

Submit all documents to:

USDA-OFM/NFC  
Financial Services Division  
Payroll/Personnel Operations Section  
PO Box 60000  
New Orleans, LA 70160

**Special Processing Considerations**

- The Last Day In Pay Status field must be entered.
- The FEHB Coverage field must be entered. If *I* (enrolled) is entered on the processing action, one of the following remarks codes must also be entered:

- 388** - Terminate FEHB enrollment
- 389** - Transfer FEHB enrollment to OPM
- 390** - Transfer FEHB enrollment to DC Retirement System
- 564** - Terminate FEHB - Not enrolled since first opportunity
- 565** - Terminate FEHB - Not enrolled 5 years
- 566** - Terminate FEHB - No survivor eligible to continue health benefits

- The Losing/Gaining Department field must be completed.

## Severance Pay

The Payroll/Personnel System will automatically generate the Add Severance Pay Screen (Figure 13) with Action Code A (add) whenever Remarks Code N22, *Entitled to \$ (amount) severance pay fund to be paid at the rate of \$ (amount) per week over (number) weeks beginning (date)*, is entered on the separation personnel action in PACT.

### Special Processing Considerations

If Remarks Code N22 is entered on the separation action and the separation action is inadvertently released without completing this screen, the system will change the PACT Status Code to S, Edited/Waiting For Severance Pay.

To complete the severance pay screen (1) retrieve the action through PACT, (2) change the PACT status code to **R** (release), and (3) press [Enter]. The Add Severance Pay Screen (Figure 13) is automatically displayed.

For detailed information on changing the status code in PACT, see the instructions under [Changing The Personnel Action](#).

**Note:** Select PRES Document Type 128 to change or stop severance payments. Enter Transaction **C** to change or correct payments or Transaction Code **S** to stop payments.

### PQSEV

The Information/Research Inquiry System (IRIS), Program 135, Severance Pay Computation, can be used to view a projected weekly and biweekly severance payment amount. The data displayed on IRIS Program 135 is based on current information in the employee's database records. No actual severance payment is made on

this projection. The actual severance payment is made based on the processing of a separation action in PACT with Remarks Code N22 and the completion of the Add Severance Pay screen. IRIS Program 134, Severance Payment, is available for viewing the actual severance payment that is processed.

**Adding A Severance Pay Document.** At the Add Severance Pay screen, complete the fields as follows:

- 1 Transaction Code.** Transaction Code A is generated when Remarks Code N22 is entered on the separation personnel action.
- 2 Total Severance Fund** (*required, numeric field; Max. of 7 positions*). Enter (in dollars and cents) the total severance pay amount that the employee is entitled to receive.
- 3 Severance Amount Per Pay Period** (*required, numeric field; max. of 7 positions*). Enter (in dollars and cents) the biweekly severance pay amount that the employee is entitled to receive. **Note:** This is a biweekly amount, not a weekly amount).
- 4 Date Severance Pay Begins** (*required, numeric field; 6 positions*). Enter the beginning date for severance pay in month, day, and year order. **Note:** This date should be the same as the beginning date entered in Remarks Code N22.
- 5 First Severance Payment Amount** (*optional, numeric field; max. of 7 positions*). Enter the first severance payment amount in dollars and cents **only** if it differs from the Severance Amount Per Pay Period field; otherwise, leave blank. **Note:** If the employee separates in the middle of a pay period, the first payment would be a partial payment. If a late action is processed, the first payment may include multiple payments.

```

PP12801M                ADD SEVERANCE PAY                01/20/00
SSNO 123456789  DEPT/AGCY AG      POI 5317  EFF PAY PERIOD 20  (PF1=NOA)
AUTH DATE 12/20/99 FUNCTION A    OPER INIT  SCS          (CLR=EXIT)
1ST NOA CODE 317 1A AUTH CODE ZLM 1B AUTH CODE
2ND NOA CODE      2A AUTH CODE      2B AUTH CODE

NAME LAST      STRAYTON          FIRST STEVEN          MIDDLE R
TRANSACTION CODE (VALID VALUE IS A-ADD)  1                A
TOTAL SEVERANCE FUND (I. E. $2460.20 = 2460.20)  2                .
SEVERANCE AMOUNT PER PAY PERIOD (I. E. $246.02 = 246.02)  3                .
DATE SEVERANCE PAY BEGINS (ENTER IN MONTH, DAY, YEAR ORDER)  4                .
FIRST SEVERANCE PAYMENT AMOUNT (THE AMT PAID FOR SEV PAY ON  5                .
THE 1ST PAYMENT MAY DIFFER FROM THE REGULAR PAYMENTS. THIS IS USED
IF SEV ACTION WAS PROCESSED LATER OR INCLUDED A PARTIAL PAYMENT)
ACCOUNTING DISTRIBUTION  6                STATUS S  7
DC904874 KEY IN REQUIRED FIELDS AND PRESS ENTER TO ADD DOCUMENT
    
```

Figure 13. Add Severance Pay Screen

**6 Accounting Distribution** (*required, numeric field; max. of 27 positions*). Enter the accounting code to which the severance payments are to be charged.

**7 Status** (*required, alpha field; 1 position*). Transaction Code S is generated. Enter the status code. Valid values are **R** (release), **H** (hold), and **I** (incomplete). For detailed information, see [Remarks and Status Fields](#).

Press [Enter].

After the data passes system edits, the message *Document Successfully Added* is displayed at the bottom of the screen. If the data does not pass system edits, an edit message is displayed at the bottom of the screen. All messages must be corrected before the PACT database is updated.

- To add a severance pay document for another employee, press [PF1] to return to the PACT menu and repeat the above process. Otherwise, press the applicable key as displayed near the top of the screen.

**Changing, Deleting, And Viewing A Severance Pay Document.** For instructions on changing, viewing, and deleting a severance pay document, see [Changing the Personnel Action](#), [Deleting the Personnel Action](#), and [Viewing the Personnel Action](#).

**8 First Severance Payment Amount** (*optional, numeric field; max. of 7 positions*). Enter the first severance payment amount in dollars and cents **only** if it differs from the Severance Amount Per Pay Period field;

otherwise, leave blank. **Note:** If the employee separates in the middle of a pay period, the first payment would be a partial payment. If a late action is processed, the first payment may include multiple payments.

**9 Accounting Distribution** (*required, numeric field; max. of 27 positions*). Enter the accounting code to which the severance payments are to be charged.

**10 Status** (*required, alpha field; 1 position*). Transaction Code S is generated. Enter the status code. Valid values are **R** (release), **H** (hold), and **I** (incomplete). For detailed information, see [Remarks and Status Fields](#).

Press [Enter].

After the data passes system edits, the message *Document Successfully Added* is displayed at the bottom of the screen. If the data does not pass system edits, an edit message is displayed at the bottom of the screen. All messages must be corrected before the PACT database is updated.

- To add a severance pay document for another employee, press [PF1] to return to the PACT menu and repeat the above process. Otherwise, press the applicable key as displayed near the top of the screen.

**Changing, Deleting, And Viewing A Severance Pay Document.** For instructions on changing, viewing, and deleting a severance pay document, see [Changing the Personnel Action](#), [Deleting the Personnel Action](#), and [Viewing the Personnel Action](#).

## Retirement

A retirement separation action is processed when an employee who has contributed monies to a retirement system is eligible to retire and collect an immediate annuity.

Federal employees on the rolls prior to January 1, 1984, were covered by one of the following retirement systems: (1) Civil Service Retirement System (CSRS), (2) Social Security (FICA), (3) Foreign Service (FS), or CS - (Special) Civil Service - 7 1/2% deductions.

The employee's retirement coverage code is usually initiated and established in the database at the time of hire. An official change action must be processed in PACT to change or correct an employee's retirement coverage code. Personnel offices should also review the employee's official personnel file (OPF) for creditable service in order to determine the proper code before entering the personnel action in PACT.

The change/correction to the retirement coverage code should be processed in PACT as soon as possible if the employee is eligible for retirement, otherwise, the retirement record could be delayed.

When an employee elects to retire, a retirement package must be completed. This package consists of all documentation required by NFC and OPM to process the retirement. All documents must be completed and reviewed for accuracy before submitting to NFC. For detailed information on the retirement package, see the Processing Retirement Documents procedure.

The agency personnel offices **must** enter data into the Retirement Processing System (RETM) to track the employee's application before sending the retirement package to NFC. See the Retirement Processing System procedure for detailed information.

Submit the entire retirement package to:

USDA-NFC  
Payroll Accounting Section  
Fringe Benefit Processing Unit  
PO Box 29310  
New Orleans, LA 70129

If submitting by express mail, send to:

USDA-NFC  
Payroll Accounting Section  
Fringe Benefit Processing Unit  
13800 Old Gentilly Road  
New Orleans, LA 70129

The retirement package should be submitted in an envelope marked "**DELIVER IMMEDIATELY - DO NOT**

**OPEN IN MAILROOM.**" The documents should be attached to the Special Processing Transmittal.

See the Retirement Processing System procedure for detailed information on the types of documents that must be included in the retirement package.

The following section provides general information and processing instructions for each type of retirement.

### Processing A Preliminary Disability Retirement Action

Enter the separation personnel action in PACT. Special attention should be given to the entry of the appropriate remarks codes, FEHB coverage code, and the last day in pay status. For detailed information on these data entry fields, see [PACT Data Elements](#).

The Last Day In Pay Status field must be completed. Enter the projected final date that the employee will be in a pay status.

If the employee is currently enrolled in FEHB and will be eligible to continue FEHB coverage, enter Remarks Code **389** in the Remarks Code field.

For those employees with a retirement coverage code of **Y** or **Z** who are currently enrolled in FEHB and who will be eligible to continue FEHB coverage, enter Remarks Code **390** in the Remarks Code field.

If the employee is currently enrolled in FEHB and will **not** be eligible to continue FEHB coverage, enter Remarks Code **388** in the Remarks Code field. **Note:** Whenever Remarks Code **388** is entered, Remarks Code **564**, **565**, or **566** must also be entered in the Remarks Code field.

If the employee is currently participating in the Federal Employee's Group Life Insurance Program (FEGLI), Remarks Code **560**, **561**, **562**, or **567-573** should also be entered in the Remarks Code field.

Enter Remarks Code **211** on all preliminary disability retirement actions if the employee is in LWOP status. The entry of Remarks Code **211** will result in OPM collection of FEHB premiums from the employee's annuity instead of NFC issuing a bill to the employee.

Code the T&A final, and transmit the final T&A in the normal processing pay period. For detailed information on final T&A's, see the T&A procedure.

Enter data into the Retirement Processing System (RETM) to track the employee's application before sending the retirement package to NFC. For detailed information on the retirement package, see the Retirement Processing procedure.

□ If OPM approves the application, it will send a Form RI 30-27, in duplicate, to the agency personnel office. Upon receipt of this notification, the agency should take final action to separate the employee in accordance with OPM regulations. Prepare the final disability retirement package, and submit to OFM/NFC with Form RI 30-27.

### Processing A Final Disability Retirement Action

□ Enter the separation personnel action in PACT. Special attention should be given to the entry of the appropriate remarks codes, FEHB coverage code, and the last day in pay status. For detailed information on these data entry fields, see [PACT Data Elements](#).

□ The Last Day In Pay Status field must be completed. Enter the projected final date that the employee will be in a pay status.

□ If the employee is currently enrolled in FEHB and will be eligible to continue FEHB coverage, enter Remarks Code **389** in the Remarks Code field.

□ For those employees with a retirement coverage code of **Y** or **Z** who are currently enrolled in FEHB and who will be eligible to continue FEHB coverage, enter Remarks Code **390** in the Remarks Code field.

□ If the employee is currently enrolled in FEHB and will **not** be eligible to continue FEHB coverage, enter Remarks Code **388** in the Remarks Code field. **Note:** Whenever Remarks Code 388 is entered, Remarks Code **564**, **565**, or **566** must also be entered in the Remarks Code field.

□ If the employee is currently participating in the Federal Employee's Group Life Insurance Program (FEGLI), Remarks Code **560**, **561**, **562**, or **567-573** should also be entered in the Remarks Code field.

□ Code the T&A final, and transmit the final T&A in the normal processing pay period. For detailed information on final T&A's, see the T&A procedure.

□ Enter Form AD-581 in PRES if the employee is eligible to receive a final annual leave or compensatory time payment.

□ Enter data into the Retirement Processing System (RETM) to track the employee's application before sending the retirement package to OFM/NFC. See the Retirement Processing procedure, for detailed information.

□ Prepare Form AD-343, Payroll Action Request, if the employee has incurred a debt and an AD-343 was not previously submitted. Also submit copies of any outstanding AD-343's to OFM/NFC for final debt

collection. Do not include these copies in the retirement package. See the Nonautomated Processing chapter for additional information.

□ The processing of the retirement action in PACT results in the issuance of an SF-50-B.

□ After the retirement package is processed, an SF-2807/SF-3103, Registration of Separations and Transfers, is submitted to OPM. System-generated letters are sent to the agency personnel offices and employees as notification that the retirement package was sent to OPM.

### Processing A Mandatory Retirement Action

□ Enter the separation personnel action in PACT. Special attention should be given to the entry of the appropriate remarks codes, FEHB coverage code, and the last day in pay status. For detailed information on these data entry fields, see [PACT Data Elements](#).

□ The Last Day In Pay Status field must be completed. Enter the projected final date that the employee will be in a pay status.

□ If the employee is currently enrolled in FEHB and will be eligible to continue FEHB coverage, enter Remarks Code **389** in the Remarks Code field.

□ For those employees with a retirement coverage code of **Y** or **Z** who are currently enrolled in FEHB and who will be eligible to continue FEHB coverage, enter Remarks Code **390** in the Remarks Code field.

□ If the employee is currently enrolled in FEHB and will **not** be eligible to continue FEHB coverage, enter Remarks Code **388** in the Remarks Code field. **Note:** Whenever Remarks Code 388 is entered, Remarks Code **564**, **565**, or **566** must also be entered in the Remarks Code field.

□ If the employee is currently participating in the Federal Employee's Group Life Insurance Program (FEGLI), Remarks Code **560**, **561**, **562**, or **567-573** should also be entered in the Remarks Code field.

□ Code the T&A final, and transmit the final T&A in the normal processing pay period. For detailed information on final T&A's, see the T&A procedure.

□ Enter Form AD-581 in PRES if the employee is eligible to receive a final annual leave or compensatory time payment.

□ Enter data into the Retirement Processing System (RETM) to track the employee's application before

sending the retirement package to NFC. See the Retirement Processing procedure, for detailed information.

□ Prepare Form AD-343, Payroll Action Request, if the employee has incurred a debt and an AD-343 was not previously submitted. Also submit copies of any outstanding AD-343's to NFC for final debt collection. Do not include these copies in the retirement package. See the Nonautomated Processing chapter for additional information.

□ The processing of a retirement action in PACT results in the issuance of an SF-50-B.

□ After the retirement package is processed, an SF-2807/SF-3103, Registration of Separations and Transfers, is submitted to OPM. System-generated letters are sent to the agency personnel offices and employees as notification that the retirement package was sent to OPM.

#### Processing An Immediate Retirement - Optional Or Involuntary Separation

□ Enter the separation personnel action in PACT. Special attention should be given to the entry of the appropriate remarks codes, FEHB coverage code, and the last day in pay status. For detailed information on these data entry fields, see [PACT Data Elements](#).

□ The Last Day In Pay Status field must be completed. Enter the projected final date that the employee will be in a pay status.

□ If the employee is currently enrolled in FEHB and will be eligible to continue FEHB coverage, enter Remarks Code **389** in the Remarks Code field.

□ For those employees with a retirement coverage code of **Y** or **Z** who are currently enrolled in FEHB and who will be eligible to continue FEHB coverage, enter Remarks Code **390** in the Remarks Code field.

□ If the employee is currently enrolled in FEHB and will **not** be eligible to continue FEHB coverage, enter Remarks Code **388** in the Remarks Code field. **Note:** Whenever Remarks Code **388** is entered, Remarks Code **564**, **565**, or **566** must also be entered in the Remarks Code field.

□ If the employee is currently participating in the Federal Employee's Group Life Insurance Program (FEGLI), Remarks Code **560**, **561**, **562**, or **567-573** should also be entered in the Remarks Code field.

□ Code the T&A final, and transmit the final T&A in the normal processing pay period. For detailed information on final T&A's, see the T&A procedure.

□ Enter Form AD-581 in PRES if the employee is eligible to receive a final annual leave or compensatory time payment.

□ Enter data into the Retirement Processing System (RETM) to track the employee's application before sending the retirement package to OFM/NFC. See the Retirement Processing System procedure, for detailed information.

□ Prepare Form AD-343, Payroll Action Request, if the employee has incurred a debt and an AD-343 was not previously submitted. Also submit copies of any outstanding AD-343's to OFM/NFC for final debt collection. Do not include these copies in the retirement package. See the Nonautomated Processing chapter for additional information.

□ The processing of an immediate retirement action in PACT results in the issuance of an SF-50-B.

□ After the retirement package is processed, an SF-2807/SF-3103, Registration of Separations and Transfers, is submitted to OPM. System-generated letters are sent to the agency personnel offices and employees as notification that the retirement package was sent to OPM.

**System Retired  
Reference Only**

**System Retired  
Reference Only**

**Appendixes**

**Nature Of Action Codes - 900 Series Table**

<b>NOAC Code</b>	<b>Description</b>	<b>Produces SF-50B</b>	<b>Restricted Agency Use</b>	<b>Dept/ Agency Code</b>	<b>OPM Auth Code Req.</b>
900	Conversion to USDA	No	Yes	Assigned at time of conversion	No
Use to establish employee payroll/personnel data in the USDA OFM/NFC Payroll/Personnel System during the conversion from a payroll system other than USDA OFM/NFC.					
901	Master File Update	Yes	No		No
Use to update retained grade information, etc. (e.g., correction to an NTE date).					
903	Change in PMSO Element	Yes	No		No
Use to document a change in PMSO data, e.g., organizational structure code, when no other NOAC is appropriate.					
906	SCSEP Enrollee	Yes	No		ZLM
Use to appoint an employee to a position, not to exceed 1300 or 2000 hours, under the Older American Program.					
908	Termination	Yes	No		No
Use to terminate a non-employee, e.g., one enrolled in a Federal enrollment program or on the rolls for continuation of pay.					
910	Change in Title	Yes	No		No
Use to change either the organizational title or the position title when no other change is being made.					
911	YCC Enrollee	Yes	No		ZLM
Use to appoint an employee in a position under the YCC Program.					
915	Health Benefits Coverage	Yes	No		No
Use to correct the FEHB coverage code.					
917	Annuitant Adjustment	Yes	No		ZLM
Use to update records of reemployed annuitants when the annual cost of living (COLA) increase becomes effective.					

**Nature Of Action Codes - 900 Series Table** *(cont'd)*

<b>NOAC Code</b>	<b>Description</b>	<b>Produces SF-50B</b>	<b>Restricted Agency Use</b>	<b>Dept/ Agency Code</b>	<b>OPM Auth Code Req.</b>
919	PD Number Change Use to change the position description number (either Master Record or Individual Position) when no other change is made.	Yes	No		No
920	Continuation of Pay Use if an employee sustains a traumatic injury and is not expected to return to work within 30 days of the injury date.	No	No		No
922	Detail NTE Use to detail an employee to an unclassified position.	Yes	No		No
923	Ext of Detail NTE Use to extend an employee's detail to an unclassified position.	Yes	No		No
924	Termination of Detail Use to terminate the detail for an employee occupying an unclassified position.	Yes	No		No
925	Withhold WGI-Wage Use to document denial of within-grade increase for an employee under the prevailing rate system.	Yes	No		VUL
926	Change Salary Share Use to document a change in the cooperator or state share of salary.	Yes	No		ZLM
927	Denial Within Class Increase Use to document a denial of Foreign Service within class increase.	Yes	No		ZLM
928	Volunteer Accession Use to document a volunteer appointment.	Yes	No		No
929	Volunteer Separation Use to document the separation of a volunteer.	Yes	No		No

**Nature Of Action Codes - 900 Series Table** *(cont'd)*

NOAC Code	Description	Produces SF-50B	Restricted Agency Use	Dept/ Agency Code	OPM Auth Code Req.
930	Change in Quarters Deductions Use to process a change in quarters deductions.	Yes	No		No
933	Non-Temp Conditional Appointment Use for an employee hired under a non-temporary conditional appointment.	Yes	Yes	GA, NF	No
934	Conversion to Non-Temp Conditional Appointment Use to process conversion of a non-temporary conditional appointment.	Yes	Yes	GA, NF	No
953	Indefinite Appointment Use to process an indefinite appointment for a Smithsonian Institution Trust employee.	Yes	Yes	NF	No
954	Conversion to Indefinite Appointment Use to process a conversion of an indefinite appointment for a Smithsonian Institution Trust employee.	Yes	Yes	NF	No
955	Temporary Appointment Accession Use to process a temporary accession for a Smithsonian Institution Trust employee.	Yes	Yes	NF	No
956	Conversion to Temporary Appointment Use to process a conversion to a temporary appointment for a Smithsonian Institution Trust employee.	Yes	Yes	NF	No
957	Extension of Temporary Appointment NTE Use to process an extension of a temporary appointment not-to-exceed for a Smithsonian Institution Trust employee.	Yes	Yes	NF	No

**Nature Of Action Codes - 900 Series Table** *(cont'd)*

<b>NOAC Code</b>	<b>Description</b>	<b>Produces SF-50B</b>	<b>Restricted Agency Use</b>	<b>Dept/ Agency Code</b>	<b>OPM Auth Code Req.</b>
968	Termination of Promotion Intermittent	Yes	Yes	AI	ZLM
Use only to document when an employee is no longer eligible to be paid acting pay.					
969	Separation	Yes	Yes	NF	No
Use to process a separation of a Smithsonian Institution Trust employee.					
976	Preliminary Disability Retirement	Yes	No		No
Use to process a preliminary disability action.					
977	Sabbatical Leave NTE	No	Yes	NF	No
Use to process a sabbatical leave not-to-exceed for a Smithsonian Institution employee.					
978	Mass Change - Detail	No	No		No
Use to process a mass change detail action for a group of employees.					
982	Recruitment Allowance	Yes	Yes	CM	No
Use to process an appointment covered by the NIST Personnel Management Demonstration Process for an employee who has accepted a recruitment allowance.					
983	Retention Allowance	Yes	Yes	CM	No
Use to process an appointment covered by the NIST Personnel Management Demonstration Process for an employee who has accepted a retention allowance.					
985	Change In Work Schedule	Yes	Yes	NF	No
Use to a change a Smithsonian Trust employee's work schedule.					
986	Change to Lower Grade	Yes	Yes	NF	No
Use to process a change to lower grade for a Smithsonian Trust employee.					

**Nature Of Action Codes - 900 Series Table** (cont'd)

NOAC Code	Description	Produces SF-50B	Restricted Agency Use	Dept/ Agency Code	OPM Auth Code Req.
987	Conversion to Institution Executive Schedule	Yes	Yes	NF	No
Use to process a conversion to the institution executive schedule for a Smithsonian Institution employee.					
988	Change In Applicable Rate Schedule	No	No		No
Use to document a change when no other rate schedule is applicable.					
989	Step/Pay Adjustment	No	No		No
Use to place a PMRS employee in a step under the general schedule when the employee is changed from a GM position to a GS position.					
990	Set Up Saved Grade Record	No	No		No
Use to establish a retained grade record when the original Position Change action is too far back in history.					
991	Termination of Temporary Promotion	No	No		No
Use to terminate a temporary promotion for an employee in grade retention and return the employee to the original position before a downgrade is processed.					
993	Change In Scheduled Part Time Hours	Yes	No		No
Use to document a change in the schedule of part time hours when the actual number of hours does not change.					
994	Honorary Award	Yes	No		No
Use to document an honorary award.					

**PACT Edit Messages**

<b>Msg. No.</b>	<b>Description</b>
904701	Effective Date Must Be Present With Action Code
904702	Data Element Invalid
904703	Date Action Authenticated Must Be Present
904704	Data Element Must Be Present
904705	Data Element Must Be Present On Accession
904706	Previous Agency Must Not Equal Employing Agency
904707	Previous Agency Code Not Compatible With Action Code
904708	Cannot Move To Unclassified Position With This NOA
904709	Master Record Number And Grade Are Not Compatible With NOA
904710	Data Element Must Be Blank
904711	NTE Date Not Compatible With Effective Date
904712	NTE Date Not Compatible With Action Code
904713	Losing Or Gaining Department Must Be Alphabetic
904714	TSP Eligibility Code Must Be 1 - 6 On Accession
904715	TSP Eligibility Code Must Be 1 - 6 Or Blank
904716	Authority Not Required With NOA
904717	Authority Required With NOA
904718	Appt Limitation Data Element Invalid - Data Allowed In One Field Only
904719	Commencing Date Of Service Not Compatible With Action Code
904720	Date SCD CSR Not Compatible With Retirement Coverage Code
904721	Date SCD CSR Not Compatible With Effective Date
904722	Supv/Mgrl Probation Period Not Compatible With Eff Date
904723	Remark Code Invalid
904724	Date Prob Period Start Not Compatible With Action Code
904725	Date Prob Period Start Not Compatible With Eff Date
904726	Name Correction Code Not Compatible With Employee Name
904727	Data Element Not Compatible With Data Element
904728	Quarters Ded Amount And Quarters Ded Code Must Both Be Present
904729	Year Degree Obtained Must Be Blank When Education Level Is < 13
904730	Agency Use Block Required For Agency Code
904731	Verify Salary Field Must Equal Base Contract Salary
904732	General Schedule Or Equivalent Must Be Per Annum Salary
904733	Authority Required With 2nd NOA
904734	Must Enter Base Contract Salary With Merit Pay Increase
904735	Pay Plan Must Be Present When Base Contract Salary Entered
904736	Please Enter All PMSO Key Elements
904737	Invalid Status Code - Valid Codes Are (H) Hold, (I) Incomplete, And (R) Release
904738	Sex Code Required On Accession
904739	Sex Code Invalid
904740	Education Level Required On Accession
904741	Education Level Invalid
904742	Veteran Pref Code Required On Accession
904743	Veteran Pref Code Invalid
904744	Tenure Group Required On Accession

**PACT Edit Messages** (cont'd)

<b>Msg. No.</b>	<b>Description</b>
904745	Tenure Group Invalid
904746	Handicap Code Required On Accession
904747	Handicap Code Invalid
904748	FEGLI Coverage Code Required On Accession
904749	FEGLI Coverage Code Invalid
904750	FEHB Coverage Code Required On Accession
904751	FEHB Coverage Code Invalid
904752	Type Of Employment Required On Accession
904753	Type Of Employment Invalid
904754	Appointment Limit Code Invalid
904755	Classification Code Not Compatible With Action Code
904756	RNO Code Required On Accession
904757	RNO Code Invalid
904758	Pay Plan Required On Accession
904759	Pay Plan Invalid
904760	Salary Rate Code Required On Accession
904761	Salary Rate Code Invalid
904762	Pay Rate Determinant Code Required On Accession
904763	Pay Rate Determinant Invalid
904764	Position Occupied Invalid
904765	Annuitant Indicator Required On Accession
904766	Annuitant Indicator Invalid
904767	Special Employment Pgms Code Required On Accession
904768	Special Employment Pgms Code Invalid
904769	Annual Leave Category Required On Accession
904770	Annual Leave Category Invalid
904771	Annual Leave 45 Day Code Invalid
904772	Veterans Status Required On Accession
904773	Veterans Status Invalid
904774	Name Required On Accession
904775	Special Employee Code Required On Accession
904776	Special Employee Code Invalid
904777	Citizenship Code Required On Accession
904778	Citizenship Code Invalid
904779	COLA Post Diff Code Required On Accession
904780	COLA Post Diff Code Invalid
904781	Base Contract Salary Invalid
904782	Promotion Plan Code Invalid
904783	Seasonal Status Quo Code Invalid
904784	Type Appointment Code Invalid
904785	Quarters Ded Amt And Quarters Ded Cd Must Both Be Present
904786	Quarters Ded Amt Invalid For Your Agency
904787	Quarters Ded Code Invalid
904788	Date Of Birth Invalid

**PACT Edit Messages** (cont'd)

<b>Msg. No.</b>	<b>Description</b>
904789	Date Of Birth Required On Accession
904790	Date Last Pay Stat Ret Invalid
904791	Date Sick Leave Exp Ret Invalid
904792	Date SCD Leave Invalid
904793	Date SCD Leave Required On Accession
904794	Date Corr Nature Actn Invalid
904795	Date NTE Invalid
904796	Date Service Year Start Invalid
904797	Date Service Year Start Required On Accession
904798	Date Retain Rate Expire Invalid
904799	Date SCD CSR Invalid
904800	Date SCD RIF Invalid
904801	Date SCD WGI Invalid
904802	Date Supv Mgrl Prob Invalid
904803	Date Probationary Period Start Invalid
904804	Date Career Permanent Tenure Start Invalid
904805	Date Retention Rights End Invalid
904806	Date Last Entered Present Grade Invalid
904807	Date Last Entered Present Grade Required On Accession
904808	Effective Date Invalid
904809	Final Day In Pay Status Date Must Be Blank
904810	Final Day In Pay Status Date Invalid
904811	Sick Leave Projection Date Must Be Blank
904812	Sick Leave Projection Date Invalid
904813	Corrected Nature Of Action Date Must Be Blank
904814	Corrected Nature Of Action Date Invalid
904815	NTE Date Not Compatible With Action Code
904816	NTE Date Not Compatible With Effective Date
904817	NTE Date Invalid With Type of Appointment
904818	Commencing Date Of Service Year Required On Accession
904819	Commencing Date Of Service Year Not Compatible With Eff Date
904820	PRD Expiration Date Not Compatible With PRD
904821	PRD Expiration Date Invalid
904822	Date SCD CSR Not Compatible With Retirement Coverage Code
904823	Date SCD CSR Invalid
904824	Date SCD CSR Not Compatible With Effective Date
904825	Date SCD RIF Not Compatible With Effective Date
904826	Date SCD RIF Invalid
904827	Date SCD WGI Not Compatible With Effective Date
904828	Supv/Mgrl Probation Period Date Invalid
904829	Supv/Mgrl Probation Period Date Not Compatible With Eff Date
904830	Agcy Not Compatible With Database - Signon To Correct Database & Reenter
904831	Date Prob Period Start Not Compatible With Action Code

**PACT Edit Messages** (cont'd)

<b>Msg. No.</b>	<b>Description</b>
904832	Date Prob Period Start Invalid
904833	Date Prob Period Start Not Compatible With Effective Date
904834	Date Career Perm Tenure Start Not Compatible With Action Code
904835	Date Career Perm Tenure Start Invalid
904836	Date Career Perm Tenure Start Not Compatible With Eff Date
904837	Expiration Date Stat Limitation Retention Invalid
904838	Expiration Date Stat Limitation Retention Must Be Blank
904839	Date Last Entered Present Grade Invalid
904840	Date Last Entered Present Grade Not Compatible With Eff Date
904841	Previous Nature Of Action Must Be Blank
904842	Previous Nature Of Action Invalid
904843	LI Coverage Amount Invalid
904844	Remark Code 1 Invalid
904845	Remark Code 2 Invalid
904846	Remark Code 3 Invalid
904847	Remark Code 4 Invalid
904848	Remark Code 5 Invalid
904849	Remark Code 6 Invalid
904850	Remark Code 7 Invalid
904851	Remark Code 8 Invalid
904852	Remark Code 9 Invalid
904853	Remark Code 10 Invalid
904854	TSP Eligibility Code Required On Accession
904855	TSP Eligibility Invalid
904856	General Schedule Or Equivalent Employee Must Be Per Annum
904857	Merit Pay Increase Not Compatible With NOA & Auth Used
904858	Remarks Invalid For NOA And Authority
904859	Losing Or Gaining Dept Invalid
904860	Key In Required Data And Press Enter
904861	Agcy Code And POI Not Compatible
904862	Data Element Not Found In Table
904863	Remarks Deleted Due To Function Selected
904864	Unable To Store PACT Document - Try Again Later
904865	Remark Code Missing - Press Clear To Return
904866	Remark Successfully Added - Press PF8 For Next Remark
904867	Fill In Remark Data And Press Enter
904868	No Document Found For Specified Key
904869	Document Found
904870	This Document Has Been Released For Processing
904871	Make Desired Changes And Press Enter
904872	Document Found - Review And Press Enter To Delete
904873	Document Already Exists For Specified Key
904874	Key In Required Fields And Press Enter To Add Document

**PACT Edit Messages** (cont'd)

<b>Msg. No.</b>	<b>Description</b>
904875	Press PF1 To Return To Menu For Next Document Selection
904876	Document Successfully (Added, Changed,Or Deleted)
904877	Routine Not Available For Function Selected
904878	Remarks On Document Do Not Require Typing
904879	Remarks Added - Status Changed To R (Released)
904880	Remarks Incomplete - Status Remains W (Awaiting Remarks)
904881	Invalid Cursor Position - Position Cursor And Retry
904882	Unable To Identify Data Element
904883	Mandatory Remark Code Required For NOA And Authority Entered
904884	Remark Found - Press Enter For Next Remark
904885	Deletion Of Document Will Delete Associated Remarks
904886	Date Last Equivalent Increase Invalid
904887	Accounting Distribution Accounting Station Invalid
904888	Retirement Coverage Code Invalid
904889	Authority Alpha Not Required For NOA Entered
904890	Authority Alpha Required For NOA Entered
904891	With Transaction Code 'S' Total Severance Fund Must Be Spaces
904892	Data Element Must Be Numeric And Greater Than Zeros
904893	With Transaction Code 'S' Biweekly Severance Amount Must Be Spaces
904894	Initial Number Of Payments Must Be 1 Thru 26
904895	Accounting Distribution Invalid
904896	Accounting Distribution Agency Is Invalid
904897	Accounting Distribution Length Is Invalid
904898	Accounting Distribution Appropriation Invalid
904899	Accounting Distribution Accounting Station Is Invalid
904900	Accounting Distribution Subcenter Is Invalid
904901	Accounting Distribution Fiscal Year Is Invalid
904902	Merit Increase > Full WGI For Grade Entered
904903	Remarks Added - Status Changed To S (Severance Pay)
904904	Severance Pay Added - Status Changed To R (Released)
904905	Severance Pay Not Added - Status Remains S (Severance Pay)
904906	Date Probation Period Start Invalid
904907	PMSO Key Department Invalid
904908	PMSO Key Agency Invalid
904909	PMSO Key POI Invalid
904910	IP-NO Must Be Spaces With Agency And Grade Used
904911	Master Record Number Invalid
904912	Authority Requires 'ES' Pay Plan
904913	Auth Requires 'FE', 'FO', 'FP', 'FQ', 'FR', Or 'FS' Pay Plan
904914	Grade Retention Expiration Date Invalid
904915	NOA Must Not Be Present For Update Action Code
904916	1B Authority Code Must Be Present
904917	Uniform Service Component Invalid

**PACT Edit Messages** (cont'd)

<b>Msg. No.</b>	<b>Description</b>
904918	CSR Coverage At Appointment Invalid
904919	SCD-Retirement Invalid
904920	Unable To Position For Store Of Remarks
904921	2B Authority Code Must Be Present
904922	Appointment Limitations - Full Amount Invalid
904923	Appointment Limitations - Balance Invalid
904924	Coop/State Share Must Be Numeric
904925	Salary Share Code Invalid
904926	Previous Agency Invalid
904927	Hourly Cooperative Agreement Rate - Overtime Invalid
904928	Hourly Cooperative Agreement Rate - Holiday Invalid
904929	Date Retired Military Invalid
904930	Frozen CSRS Service Must Be Numeric
904931	Creditable Military Service Must Be Numeric
904932	Duty Hours Per Pay Period Invalid
904933	Commencing Date Of Service Year Invalid
904934	Appointment Limitations - Full Hours Invalid
904935	Appointment Limitations - Full Days Invalid
904936	Appointment Limitations - Balance Hours Invalid
904937	Appointment Limitations - Balance Days Invalid
904938	Uniform Service Comp Must = 4 Or 5 When Date Retired Military Present
904939	Control Of Cooperative Employee Invalid
904940	Creditable Military Service Months Must Be < 12
904941	Frozen CSRS Service Months Must Be < 12
904942	Instructional Program Invalid
904943	Veteran Preference RIF Invalid
904944	Mandatory Remark Code M01 Required For NOA And Authority Entered
904945	Mandatory Remark Code T07 Required For NOA And Authority Entered
904946	Press Enter To Change Or Delete Document
904947	Mandatory Remark Code T10 Required For NOA And Authority Entered
904948	Mandatory Remark Code M06 Required For NOA And Authority Entered
904949	Mandatory Remark Code A20 Required For NOA And Authority Entered
904950	Mandatory Remark Code B03 Required For NOA And Authority Entered
904951	Mandatory Remark Code E19 Required For NOA And Authority Entered
904952	Data Element Not Compatible With Agency And NOA Used
904953	Mandatory Remark Code A70 Required For NOA And Authority Entered
904954	SCD TSP Invalid
904955	Step Invalid
904956	Grade Invalid
904957	Date Degree Obtained Invalid
904958	Quarters Deduction Amount Invalid
904959	Mandatory Remark Code A21 Required For NOA And Authority Entered
904960	Mandatory Remark Code B52 Required For NOA And Authority Entered
904961	Agency Use Invalid

**PACT Edit Messages** (cont'd)

<b>Msg. No.</b>	<b>Description</b>
904962	Agency Use Invalid
904963	Table Validation Temporarily Unavailable
904964	Mandatory Remark Code E23 Required For NOA And Authority Entered
904965	Mandatory Remark Code E24 Required For NOA And Authority Entered
904966	Mandatory Remark Code T55 Required For NOA And Authority Entered
904967	Mandatory Remark Code P48 Required For NOA And Authority Entered
904968	SCD Retirement Must Be Zeros Or Spaces When Retirement Coverage Code Is '2'
904969	SCD Retirement Required
904970	Database Error - Contact The Information Center
904971	Frozen Service Must Be Zeros Or Spaces When Retirement Coverage Is 'K'
904972	SCD TSP Required With Retirement Coverage Code 'K'
904973	Master Record Not Found For PMSO Key
904974	Individual Position Not Found For PMSO Key
904975	Pay Plan Not Eligible For Quality Step Increase
904976	Special Employee Code Invalid For NOA And Auth Used
904977	Individual Position For PMSO Key Inactive
904978	Individual Position For PMSO Key Abolished
904979	Effective Date Must Be Subsequent To Date-Est (PMSO)
904980	Cannot Detail To Incumbent Position
904981	CSR Share Must Be Numeric
904982	Case Number Cannot Be Blank or Zeros
904983	Cash Award Must Be Numeric And Greater Than Zeros
904984	Verify Amount Must Equal Current Cash Award Amount
904985	Number Of Persons Must Be Numeric And Greater Than Zeros
904986	Tangible Benefits Must Be Either '1' Or Space
904987	First Year Savings And Tangible Benefits Not Compatible
904988	First Year Savings Must Be Spaces If Tangible Benefits Is Spaces
904989	Tangible and Intangible Benefits Not Compatible
904990	Intangible Benefits Must Be '1' Or Space
904991	Agency Charged Not Valid Agency
904992	Accounting Station Charged Must Be Present When Agency Charged Is Present
904993	Agency Charged Must Be Present When Accounting Station Charged Is Present
904994	Accounting Distribution Agency Invalid
904995	Accounting Distribution Length Is Invalid
904996	Accounting Distribution Is Invalid
904997	Accounting Distribution Accounting Station Invalid
904998	Accounting Distribution Sub Center Is Invalid
904999	Accounting Distribution Fiscal Year Is Invalid
905000	Accounting Distribution Appropriation Is Invalid
906701	Address Indicator Must Equal 1, 2, 3, Or 4
906702	Amt Paid By Non Govt Source Must Be Numeric
906703	Period Covered From Date Must Be Numeric
906704	Period Covered To Date Must Be Numeric

**PACT Edit Messages** (cont'd)

<b>Msg. No.</b>	<b>Description</b>
906705	Coop/State And CSR Shares Must Be Spaces When Salary Share Code Is 0
906706	Coop/State Share Must Be Present When Salary Share Code is 1 Or 2
906709	CSR Share Must Be Present When Salary Share Code Is 3
906710	Coop/State And CSR Shares Must Be Present When Salary Share Codes Is 4, 5
906711	Agency Charged Must Be Numeric
906712	Accounting Station Charged Must Be Numeric
906713	Check Mail Address Must Be Blank When Address Indicator is 4
906714	Accounting Station Charged Invalid
906715	Generate Payment Must Be 0 Or 1
906716	Designated Agent Must Be Blank When Address Indicator Is 3
906717	First Line Of Check Mail Address Invalid
906718	Check Mail City Name Invalid
906719	Check Mail State Name Invalid
906720	Check Mail ZIP Code Invalid
906721	Designated Agent Invalid
906722	Honorary Award - Award Code 1st Position Must Be 'H'
906723	Award Code Invalid Or Not Authorized for Agency Entered
906724	MASC Is Unavailable For Validation, Try Again Later
906725	Award Code Must Be C024 For Spot Award
906727	Period Covered From Date Must Be Less Than Current Date
906728	Period Covered To Date Must Be Less Than Current Date
906729	Period Covered From Date Must Be Less Than To Date
906730	Special-Employment Programs Code Must Be D2, D3, 88 Or 99
906731	Remark Code ZH3 Must Be Present When Special Employment Programs Is D2
906732	Remark Code ZC8 Must Be Present When Special Employment Programs Is D3
906733	Amount Of Award Must Be At Least \$25 But Not > \$300
906734	Address Information Not Applicable For Address Indicator
906735	Address Indicator Must Be Spaces For NOA And Auth Entered
906736	Amount And Verify Amount Of Award Must Be Spaces For NOA And Auth Entered
906737	Generate Payment Must Be 1 For NOA And Auth Entered
906738	Amount Of Award Must Be In Increments of \$25
906739	Award Code Invalid For NOA And Auth Entered
906740	Dept And Agcy Code Invalid
906741	Auth Date Must Be Spaces
906742	NOA And Auth Codes Must Be Spaces
906743	Effective Date Must Be Spaces
906744	Award Code Must Be Spaces
906745	Period Covered From Date Must Be Spaces
906746	Period Covered To Date Must Be Spaces
906747	Verify Amount Must Be Spaces
906748	Amt Paid By Non Govt Source Must Be Spaces

**PACT Edit Messages** (cont'd)

<b>Msg. No.</b>	<b>Description</b>
906749	Generate Payment Must Be 0
906750	Mandatory Remark Code Of Either E04 Or T29 Required For NOA And Auth Entered
906751	Mandatory Remark Code Of Either E04 Or T29 Required For NOA And Auth Entered
906752	Acct Dist Must Be Present When Agcy/Acct Station Charged Are Present
906753	Stored Accounting Not Found, Accounting Distribution Must Be Present
906754	Mandatory Remark Code E07 Required For NOA and Auth Entered
906755	Travel Allowance or Environmental Differential Invalid
906756	Travel Allowance or Environmental Differential Used By Agency '07' Only
906757	Unable To Ready PMSO Database
906758	Work Schedule Invalid
906759	Period Covered To Date Must Be < Or = Effective Date
906760	Leave Earning Status During Pay Period Invalid
906761	Salary Record Not Found
906762	Tour Of Duty Hour Not Compatible With Work Schedule
906763	Varied Shift Not Compatible With Pay Plan
906764	Varied Shift Not Compatible With NOA
906765	Correction Of NOA Invalid, Must Process Cancellation
906766	Duplicate Remarks Recorded
906767	NOA Used Required SON In Agency Use Block
906768	Action Code Must Be '2' With Cancellation Of Action
906769	Position Number Must Be Blank With Agency And Grade Used
906770	Previous NOA Must Be Present When Cancellation NOA Is Used
906771	When Cancellation/Correction NOA is Used, 2nd NOA Must Be Present
906772	Cancellation/Correction NOA Must Be In First NOA Field
906773	Merit Increase Not Compatible With Base Salary
906774	Must Enter Base Salary With Merit Pay Increase
906775	Merit Pay Increase Must Be 8 Position Numeric
906776	Authority Code Not Compatible With Agency & NOA Used
906777	Grade Not Compatible With Agency and NOA
906778	Pay Plan Not Compatible With Agency And NOA Used
906779	Merit Increase Not Compatible With NOA/ Remark Code Used
906780	Merit Pay Increase Must Be Spaces Or Zeros
906781	Verify Hours Must Equal Award Hours
906782	Amount Of Award Must Not Exceed \$25000.00
906783	Supervisory Percent Must Be From 0 To 99
906784	Recruitment Bonus Must Be Greater Than Zeros
906785	Relocation Bonus Must Be Greater Than Zeros
906786	Retention Bonus Must Be From 0 - 25
906787	Award Hours Must Not Exceed 40
906788	Data Element Must Be Y, N, Or U
906789	Data Element Must Be Y Or N
906790	Data Element Must Be 0, 1, 2, Or 3

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