



OFFICE OF THE SENIOR VICE PRESIDENT —  
BUSINESS AND FINANCE

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March 25, 2003

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Re:	Release:	1481
	Service Request:	80381
	Error Reports:	None
	Programs:	PPEC101, PPFICRET, PPOT1481
	CICS Programs:	None
	Copymembers:	None
	Include Members:	None
	DDL Members:	None
	Bind Members:	PPOT1481
	CICS Maps:	None
	Forms:	None
	Table Updates:	System Messages Table
	Urgency:	Not Urgent (see Timing of Installation)

### Service Request 80381

Effective July 1, 2002, University of California Retirement Plan (UCRP or Plan) Regulation 2.20 has been modified to redefine those employees considered to be at the University of California primarily for the purposes of receiving an education and training and thus ineligible for UCRP membership.

The UCRP Plan document, Section 2.20, defines who is and who is not considered to be an "Eligible Employee" for Plan membership. Among those employees not considered to be an Eligible Employee for Plan membership are those employees at the University of California primarily for purposes of obtaining an education or training.

In recent years there has been a shift in the demographics of the UC student/employee population. There are now more employees with 50% or more appointments who happen to be students. It is no longer standard that all students spend most of their time on education or that all students who are also employed work in jobs closely connected to their academic pursuit. In recognition of the fact that the current student and employee populations overlap in different ways than when the regulation defining "Eligible Employee" was originally adopted, UC Human Resources/Benefits, after extensive consultation and review, has revised UCRP Regulation 2.20 to more accurately exclude from UCRP only those students whose employment is connected to their educational pursuit. The refinement is intended to permit UCRP eligibility for employees who are working at University jobs for a significant portion of the time and also happen to be students and provides consistency in the treatment of student employees and non-student employees with similar appointments.

Service Request 80381 asked that PPS processes be modified to allow this expanded student eligibility for UCRP.

## **Programs**

### **PPEC101**

PPEC101 performs Retirement Code consistency edits. An edit warning that employees with Student Status 3, 4, 6 or 7 are ineligible for UCRP has been removed.

### **PPFICRET**

PPFICRET derives Retirement Code, FICA Code and UI Code, as appropriate. Code disallowing derivation of a U Retirement Code for employees with Student Status 3, 4, 6 or 7 has been removed.

### **PPOT1481**

PPOT1481 is a one-time program which selects all employees with Student Status 3, 4, 6 or 7 and calls the release version of PPFICRET for possible re-derivation. It directly updates the EDB, and creates an EDB Change File (ECF). The program can be run in both non-update and update mode. It should be run first in non-update mode so the reported changes can be reviewed. EDB updates may be desirable. When ready, PPOT1481 can be run in update mode. The resulting ECF should be processed for HDB update.

## **Bind Members**

### **PPOT1481**

PPOT1481 is the plan bind for one-time program PPOT1481.

## **Table Updates**

### **System Messages Table**

Message 08-123, previously issued by PPEC101, has been deleted. It previously warned that an employee with Student Status 3, 4, 6 or 7 was ineligible for UCRP.

## **Test Plan**

A separate Test Plan has been issued with this release.

## **Installation Instructions**

A separate set of Installation Instructions has been issued with this release.

## **Timing of Installation**

The installation of this release is Not Urgent. However, as this policy has been in place since July, 2002, campuses are urged to install this release as soon as possible to remove the need for ongoing manual control of the process and retroactive adjustments for missed enrollments.

If there are any questions, please send electronic mail to Phil.Thompson@ucop.edu, or call at (510) 987-0468.

Phillip Thompson

cc: Jerry Wilcox