



OFFICE OF THE SENIOR VICE PRESIDENT —
BUSINESS AND FINANCE

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Re:	Release:	1486
	Service Requests:	80415
	Programs:	PPCTBUFE, PPCTGTNE, PPEG205, PPEI505, PPEM205, PPP400, PPRCNET, PPOT1486 (one-time)
	CICS Programs	None
	Copymembers:	CPWSXIC2
	Include Members:	None
	DDL Members:	None
	Bind Members:	PPOT1486 (new)
	CICS Maps:	None
	Forms:	None
	Table Updates:	System Messages Table, Bargaining Unit Table, Bargaining Unit Agency Fee Table, Benefits Rates Table, Gross-to-Net Table
	Urgency:	Date Mandated (see Timing of Installation)

This release addresses the following service request:

Service Requests 80415

Service Request 80415 asks that the Payroll Personnel System (PPS) be modified as follows:

Labor Relations has requested that changes be made to the UAW, AFSCME, and CUE dues processes so that dues in the affected bargaining units are deducted according to the following rules:

- the system should assess dues based on unit earnings only and;
- dues should resume when a former dues-paying employee returns to the unit, regardless of whether the interim appointment was a non-represented position or a covered position in another unit and;
- in the event of separation, dues should be retained on the employee record for 61 months. If the employee is rehired or re-appointed, the dues should be reinstated, regardless of whether the employee has a current or future appointment in the unit. Once reinstated, dues should be assessed on unit earnings only. In order to maintain consistent application of this functionality across bargaining units, a retention of 61 months should be applied to IX and NX units.

General Strategies

The long-term strategy for handling union dues involves the development of one generic union dues process that will apply to all bargaining units. In this generic process, union dues will be assessed on within unit earnings only, and there will be a number of present or future variables that will be optional for each bargaining unit. These variables will include:

- dues continuation when an employee moves to uncovered positions
- dues retention in the event of separation, and if so, for how many months
- multi-unit link functionality (in the case of multiple units represented by the same union)

This generic union dues process is currently in the preliminary stages of planning and development.

Programs

PPCTBUFE

Currently, this module edits the data on the Bargaining Unit Agency Fee Table.

Since the CX unit is no longer participating in the Dues Movement Process, the value of 'C' has been removed from the list of valid Organization BUC Link values.

PPCTGTNE

Currently, this module edits the data on the Gross-to-Net Table.

Logic has been changed to allow valid Collective Bargaining Behavior Code of '1', '2' or '3' together with either a valid Collective Bargaining Eligibility Code of '1', '2', '3', '4', or '5' for GTN numbers related to dues deductions (GTN Group of 'U') only.

PPEG205

All references to the 88 level field name of "IC2-UPTE-DUES-MOVEMENT" have been changed to a non-unit specific field name of "IC2-DUES-MOVEMENT".

PPEI505

Currently, when a dues deduction GTN is defined on the GTN table with a Collective Bargain Behavior Code of '3' (If ineligible, de-enroll; do not de-enroll if enrolled currently), and PPBRSC returns BRSC-INELIGIBLE-FLAG of '3', message "EMPLOYEE WILL BE DE-ENROLLED BECAUSE OF COLL. BARG. INELIGIBILITY" (08-707) is erroneously issued for an employee already enrolled in dues deduction. The message has been replaced with message "EMPL ALREADY ENROLLED IN DUES DED, DEDUCTION WILL BE RETAINED" (08-695) for deductions related to dues only.

PPEM205

All references to the 88 level field name of "IC2-UPTE-DUES-MOVEMENT" have been changed to a non-unit specific field name of "IC2-DUES-MOVEMENT".

PPOT1486

This one-time program has been developed to move those employees who are currently enrolled in the uncovered CX dues deduction (GTN 479-G) to the covered dues deduction (GTN 374).

PPP400

In the same manner as the BX and NX units, modifications have been made so that for the CX, EX, and SX units, the PPPBUF Dues Base indicator is not overridden. Therefore, CX, EX, and SX dues activities are blocked unless eligible CX, EX, or SX unit payments respectively are issued. Note that similar change should be made for the Santa Cruz local unit K7 so that the PPPBUF Dues Base indicator is not overridden.

PPRCNET

The Rush Checks process has been modified so that for both the EX, SX units and the CX unit, the PPPBUF Dues Base indicator is not overridden. That is, when either the CX unit, EX unit or SX unit is indicated, there is no pre-examination of payments or appointments. Instead, there will be strict adherence to the “unit” only value contained on the PPPBUF table for the CX, EX, and SX units (similar to the BX and NX units). Note that similar change should be made for the Santa Cruz local unit K7 so that the PPPBUF Dues Base indicator is not overridden.

CopyMembers

CPWSXIC2

The CX unit has been removed from the list of units participating in the Dues Movement Process. The unrepresented GTN 479 defined in the IDC Union Array has been removed.

Bind Members

PPOT1486 (new)

A plan bind member has been created for one-time program PPOT1486.

Table Updates

System Message Table

New messages issued by the File Maintenance Process (PPEI505) have been added to the System Message Table.

The update transactions in release file PAYDIST.R1486.CARDLIB (MSGPROD) and the completed facsimile form UPAY554 sent with this release are supplied for both Test and Production.

Bargaining Unit Table

Updates to the Number of Months for Dues Retention field are provided in this release.

The UDUEN GTN Number 479 associated with each unrepresented bargaining unit is removed from the DB2 PPPBUG table.

No transactions are provided for campus-specific bargaining units related to AFSCME Organization. For example, Santa Cruz should produce update transaction to update the Number of Months for Dues Retention with a value of ‘61’ for the K7 unit.

The update transactions in PAYDIST.R1486.CARDLIB(BUTPROD), and the completed facsimile form UPAY565A sent with this release, are supplied for ***Test and Production.***

Bargaining Unit Agency Fee Table

Updates to remove the value of ‘C’ from the ***Bargaining Unit Organization Link*** field for the CX unit and to remove the entire record defining the “unrepresented CX GTN 479” for the CX unit are provided in this release. Similar transactions should be produced for the Santa Cruz local UNIT OF K7.

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The update transactions in PAYDIST.R1486.CARDLIB(BUFPROD), and the completed facsimile form UPAY565E sent with this release, are supplied for *Test and Production* with the approval of your campus Payroll Manager.

Benefits Rates Table

Updates to remove the rate for unrepresented CX dues deduction (GTN 479) are provided in this release. The update transactions in PAYDIST.R1486.CARDLIB(BRTPROD), and the completed facsimile form UPAY712 sent with this release, are supplied for *Test and Production* with the approval of your campus Payroll Manager.

Gross-to-Net Table

Update transactions are provided to update the Collective Bargaining Behavior Code for GTN Numbers 073, 374, 486, and 377. In addition, GTN Number 479 is marked "Inactive". Similar GTN transactions should be produced for the Santa Cruz local UNIT OF K7.

Use the transactions in PAYDIST.R1486.CARDLIB(GTNPROD), or key from the provided facsimile UPAY545 form. *Note that the local GTN Priority Numbers must be assigned in place of the '????' in columns 4 through 7.* These transactions may be used both for testing and production, with the approval of your campus Payroll Manager.

JCL (new)

- PPOT1486

To create JCL to run one-time PPOT1486, sample JCL in PAYDIST.R1486.JCL can be used as a model.

Test Plan

An installation Test Plan is provided with this release.

Installation Instructions

Installation Instructions are provided as a separate document.

Timing of Installation

The installation of this release is *Date Mandated*.

This release must be installed after the final compute for May earnings but before the first compute for June earnings. We suggest that the installation in production should be done after running Monthly Periodic Maintenance to begin June, 2003, but before the first compute run after that maintenance.

If there are any questions, please send electronic mail to Jackson.Quan@ucop.edu, or call at (510) 987-0464.

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cc: Jerry Wilcox