



OFFICE OF THE SENIOR VICE PRESIDENT —
BUSINESS AND FINANCE

OFFICE OF THE PRESIDENT
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Re:	Release:	1507
	Service Requests:	80564
	Programs:	PPOT1507 (one-time)
	CICS Programs	None
	Copymembers:	None
	Include Members:	None
	DDL Members:	None
	Bind Members:	PPOT1507
	CICS Maps:	None
	Forms:	None
	Table Updates:	None
	Urgency:	Date Mandated (see Timing of Installation)

This release addresses the following service request:

Service Request 80564

The University of California and the University Professional and Technical Employees (UPTe) reached agreement on a new contract covering employees in the TX (Technical) unit. The terms of the agreement provide across-the-board (ATB) increases to eligible open range employees effective October 1, 2002. Eligible employees are those who were employed by the University and were exclusively represented by the TX unit on June 30, 2003, the effective date of the agreement. The wages article for this agreement, effective June 30, 2003, includes the following stipulations:

- Effective October 1, 2002, step-based employees in the bargaining unit, or on approved leave, as of the contract effective date will receive a 0.5% salary increase. Additionally, eligible employees will receive a within-range one-half step merit increase, also effective October 1, 2002;
- Effective October 1, 2002 (or September 29, 2002, the closest biweekly pay period), open range employees in the bargaining unit, or on approved leave, as of the contract effective date will receive a 1.5% within-range increase;

The contract also calls for various campus-specific and title-specific adjustments as well as a step conversion for all open-range employees in the unit, effective July 1, 2004.

UCOP Compensation will perform the initial TCS range adjustments, while campuses will implement the step-based range and merit adjustments using existing processes. No additional programming will be necessary to handle these portions of the wage agreement.

Therefore, in order to distribute these monies to represented TX unit employees meeting the eligibility criteria, a special Payroll/Personnel System (PPS) program should be developed. The program may be modeled after the previous one-time program in Release 1355 for ATB implementations. The contract requires that the base wage level of eligible open range career and limited employees is increased by 1.5% per month. The process should calculate the increase for non-step based employees, create EDB update transactions, costing transactions and generate retroactive pay transactions.

Although pay scale files are not applicable to the eligible portion of the TX population associated with this one-time process, a header record which identifies the Effective Date of the wage increase must still be applied to the Pay Scale Update process associated with this release.

For a further overview and detailed eligibility requirements, see Service Request 80564, *TX ATB Open Range Wage Increase Requirements*, available at the Campus Payroll Maintenance web site.

Programs

PPOT1507(new)

PPOT1507 was copied from one-time program PPO13551 (Release 1355). That one-time program (PPO13551) was copied from the normal range adjustment program PPP910, and then modified. Although this one-time process is not expected to use the standard correction turnaround documents, all reports normally produced by PPP910 are produced by the one-time program. However, some variation occurs in the records selected for those reports, especially those accepted for the PPP9102 Salaries Report. See below in the discussion of PPIRANGE. The one-time must be run twice, equivalent to the Preliminary 1 and Final phases of PPP910. The Run Specification to select these phases is exactly as for PPP910. The Preliminary 1 phase will produce reports and an output file like the wrap-around file used in PPP910. This file will serve as input to one-time program PPO13552. The Final phase will create the EDB update transactions and the costing transactions. The former must be run through normal batch EDB maintenance and related functions, such as HDB update. The costing transactions must be run through the normal costing process. Additionally, the wrap-around input file to the Final phase will also be used as input to the Retroactive Merit/Range process and must also be saved for a special reporting process which will be released at a later date.

The following significant changes have been made in the one-time to the PPP910 code.

If it is the Preliminary 1 phase (PRLM1 in columns 12 through 16 of Specification Run record), the cursor selection of appointments is evaluated for consistency with the eligibility for the TX Unit rate increase requirements.

Appointment examination for the employee is bypassed when the employee's Separation Date is prior to June 30, 2003. Otherwise the appointments are selected based on the following conditions:

- Appointment Title Unit Code is equal to 'TX'
- Appointment Representation Code is equal to 'C'
- Appointment Rate Code is not equal to 'B'
- Appointment Begin Date is equal or prior to October 1, 2002
- Appointment End Date is equal or later than June 30, 2003
- Appointment Without Salary not equal to 'Y'
- Appointment Type is equal to '2' (Regular/Career), '3' (Limited), '7' (Partial Year/Career), or '8' (Floater)

If the above conditions are satisfied and the Appointment Title Code is '8399', '8396', '8363', or '8334' the associated distributions are selected for processing. However, if the Appointment Title Code is not '8399', '8396', '8363', or '8334' and the above conditions are satisfied, the Title Code table (PPPTSB) is accessed to determine whether the Appointment is eligible for the open range wage increase. Thus, the Title Code table is accessed using the Appointment Title Code, Appointment Sub Location Code, and Appointment Representation Code as keys. If

the Title Code is found and the Merit Based Indicator is equal to 'Y', the associated distributions are selected for processing.

In addition to being Range Adjustable, DOS code validation has the additional requirements of Pay Category N (normal) and a Type of Hours Code R (regular), O (overtime), or P (premium overtime). Also, requirements specify the inclusion of Time On Call DOS Codes (i.e., Pay Category A combined with Type of Hours Code O).

PPIRANGE is called to access the Pay Scale Table, as in PPP910, to find a match on Title Code, Coverage Code, RDUC, Rate Type and Old Rate. Since the Pay Scale Table will be empty (except for the header record specifying the effective date of October 1, 2002), only PPIRANGE return code value 09 is expected. However the return codes are handled somewhat differently from PPP910 in order to be consistent with prior one-time versions of PPP910:

00 indicates a match was found and a new rate was returned. This remains unchanged. The rate is used and no further calculation occurs for that rate.

07 indicates the old rate was greater than the old maximum, and a new rate equal to the new maximum was returned. This remains unchanged. The rate is used and no further calculation occurs for that rate.

02, 03, 04 all indicate the Title Code was on the Pay Scale Table but some other portion was a non-match. The rates associated with these return codes are given an adjustment increase based on the eligibility definitions identified in the service request. They appear on the Range Adjustment Exceptions report, but are also accepted on the Salaries Report with their calculated new rate. EDB transactions will be produced for these cases.

05 indicates the Title Code was on the Pay Scale Table but the rate was less than the minimum. The rates associated with this return code are given an adjustment increase as per the service request. They appear on the Range Adjustment Exceptions report, but are also accepted on the Salaries Report with their calculated new rate. EDB transactions will be produced for these cases.

06 indicates the Title Code was on the Pay Scale Table but the rate was greater than the new maximum. The rates associated with this return code are given an adjustment increase as per the service request. They appear on the Range Adjustment Exceptions report, but are also accepted on the Salaries Report with their calculated new rate. EDB transactions will be produced for these cases.

09 indicates the Title Code was not found. These appointments are considered to be "open range" (i.e., Non-Step) based appointments. These are given an adjustment increase as per the service request. They appear on the Range Adjustment Exceptions report, but also are accepted on the Salaries Report with their calculated new rate. EDB transactions will be produced for these cases.

The decimal or dollar "rounding" used for the calculated wage increases will be consistent with the Requirements. For purposes of requirement definition, "Non-Step" based appointments are those for which the Title Code is not present on the Pay Scale Table; this distinction is necessary for "rounding" purposes as per the requirements.

The rate used for "calculated" increases is moved to a new field on the output transaction to be passed to a subsequent one-time reporting program. Records that got their rate directly from the Pay Scale Table contain zero in this field. The percentage adjustment amount plus 1.0 are multiplied against the old rate in order to calculate the new rate.

PPP910 uses the error code to determine which report a transaction appears on, and also controls the creation of EDB update transactions and costing transactions. The process now accepts error codes 01 and 07. This logic is modified to accept error codes 01, 02, 03, 04, 05, 06, 07 and 09.

Originally, an Action Code of '28' is assigned to EDB File Maintenance transactions and costing transactions. The Action Code of '28' will be changed to '43' (Change in Rate), and assigned to the EDB File Maintenance transactions and the costing transactions.

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Logic is added to update the employee's Next Salary Review Date (EDB 0136). If the appointment type is equal to '2' (Career/Regular) or '7' (Career/Partial Year), the employee's Next Salary Review Date (EDB 0136) will be set to 10/01/03.

EDB Distributions that cross the effective date boundary (10/01/02 on the Pay Scale header) are ended as of 09/30/02 and new distributions created with a begin date of 10/01/02 and an end date equal to the original end date of the terminated distribution. Distributions starting 10/01/02 or later merely have their rate updated. Aside from the error code controls mentioned in the previous paragraph, this code already exists in PPP910.

Bind Members

PPOT1507

PPOT1507 is the one-time bind member for one-time program PPOT1507.

Test Plan

An installation Test Plan is provided with this release.

Installation Instructions

Installation Instructions are provided as a separate document.

Production JCL

The test JCL provided with this release to run PPOT1507 can be used as a model to create the production one-time JCL.

Timing of Installation

The installation of this release is *Date Mandated*.

This wage increase is retroactively applicable to October 1, 2002 and should be applied as quickly as possible so as to reduce the span of retroactive adjustment necessary as well as producing timely payment. This payment must be made no later than October 28, 2003.

The installation of this release is dependent on the base UCOP changes applied to program PPTCTUTL in Release 1502.

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