



OFFICE OF THE SENIOR VICE PRESIDENT —
BUSINESS AND FINANCE

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August 22, 2003

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Re:	Release:	1511
	Service Requests:	80520
	Programs:	PPOT1511 (one-time), PPEA001, PPEA002, PPEI204, PPEI206, PPELGRPT, PPEM111, PPP138, PPP650
	CICS Programs	None
	Copymembers:	CPPDXBUD, CPWSXELG
	Include Members:	None
	DDL Members:	None
	Bind Members:	PPOT1511
	CICS Maps:	None
	Forms:	UPAY770
	Table Updates:	Data Element Table, CICS Help
	Urgency:	Date Mandated (see Timing of Installation)

This release addresses the following service request:

Service Request 80520

UC Human Resources and Benefits have requested several changes to the Payroll/Personnel System (PPS) to improve the ability to monitor compliance with benefits eligibility rules. These modifications are short term changes intended to bring the system more in compliance with revised benefits regulations.

Service request 80520 asks that the following items be changed:

1. The existing values for the Primary BELI Status Qualification Code (EDB 0240) and Secondary BELI Status Qualification Code (EDB 0242) are being revised to eliminate certain values that are no longer necessary. Changes to the Data Element Table, Data Dictionary entries, and on-line help should be made to reflect the elimination of the appropriate BELI Status Qualification Codes.
2. A one-time program should be provided to initialize the obsolete BELI Status Qualification Code values.
3. The derivation of the BELI Change Date (EDB 0183) should be modified to prevent changing the date unless the value of the Assigned BELI (EDB 0360) changes.
4. The edits for BELI Effective Date (EDB 0341) should be modified to prevent updating the BELI Effective Date unless the Assigned BELI is changed.

5. The derivation of Benefits Eligibility Date (EDB 0361) should be modified. The Benefits Eligibility Date should always be set to the month of the hire date on a new hire or rehire, and should only be reset for a continuing employee when the new BELI confers greater eligibility.
6. The Derived BELI (EDB 0375) should be derived to a value of '1' in monthly maintenance when the employee qualifies for benefits because of 1000 hours. A correction to the handling of future student appointments should also be made.
7. Several of the reports produced by PPP650 related to benefits eligibility should be made obsolete. Form UPAY770 should be modified to reflect this change.
8. The monthly report listing employees who have achieved benefits eligibility because of 1000 hours should be modified to display before and after values of the derived BELI.

Differences from requirements

The following requirement has been withdrawn from Service Request 80520, and will be addressed in a separate future service request.

- When there is a future student appointment

During the user's analysis for preparing requirements for short term benefits changes, an error in the BELI Derivation logic related to the handling of future student appointments was discovered. A temporary work field (BELI Sub-2) is set to '6' whenever there is a future student appointment. This is true even if there is a current appointment that qualifies for a BELI of '4', or if there is another future appointment that qualifies an employee for full benefits. This can result in a final BELI derivation that is incorrect.

BELI Derivation logic should be modified so that a future student appointment is not considered if there is a current appointment. It should further be modified so that when there are no current appointments, a future student appointment is considered in combination with other future appointments in the same manner that current student appointments are considered with other current appointments.

Programs

PPOT1511 (new)

A one-time process is developed to identify employee records with BELI Qualification Code values that are now obsolete. A DB2 cursor is defined to select only those employees whose EDB records contain a value of '10', '50', or '80' in the Primary BELI Status Qualification Code or Secondary BELI Status Qualification Code field. Primary BELI Status Qualification Codes and/or Secondary BELI Status Qualification Codes of '10', '50', or '80' are initialized to a value of blank. In addition, the appropriate BELI Qualification Effective Date is initialized to a low-date value of '0001-01-01'.

PPEA001

Logic has been changed so that the Benefits Eligibility Date is set to the first of the month of the Most Recent Hire Date (EDB 0113) when a new hire is processed.

PPEA002

Logic has been changed so that the Benefits Eligibility Date is always set to the first of the month of the Most Recent Hire Date when a rehire (Action Code '02') is processed.

PPEI204

Logic has been changed so that the BELI Change Date is only updated when the new value of the Assigned BELI is different from the old value.

The logic which issues message 08-335, "BELI EFFECTIVE DATE REQUIRED WHEN BELI IS CHANGED", has been changed so that the message is not issued when the new value and the old value of the Assigned BELI (EDB 0360) are the same.

Logic has been changed so that the BELI Effective Date (EDB 0341) is reset to its prior value if the Assigned BELI has not been updated, or if the Assigned BELI has been updated and its new value is the same as the old value.

Logic has been changed so that the Benefits Eligibility Date is only changed when the new Assigned BELI confers greater benefits eligibility than the prior Assigned BELI.

PPEI206

Currently the Assigned BELI (EDB 0360) is set to '1' in EDB Monthly Maintenance when the employee achieves benefits eligibility because of 1000 hours on pay status.

Logic has been added to also set the Derived BELI (EDB 0375) to '1' at the same time.

PPELGRPT

Logic has been added to move the new Derived BELI Indicator (EDB 0375) to the report file for subsequent reporting via PPP138.

PPEM111

Currently, when an employee is separated, the BELI Indicator is changed to '?', and the Benefits Eligibility Date (EDB 0361) is updated to the SCR Current Date.

This module has been changed to not update the Benefits Eligibility Dates when the BELI Indicator is changed to '?' for a separated employee.

PPP138

A column header of "BEF/AFT" has been added under the heading "DERIVED". The "before" and "after" values of the Derived BELI Indicator are displayed under the new column heading "BEF/AFT".

PPP650

The logic associated with the obsolete reports PPP6501, PPP6503, PPP6505, PPP6506, PPP6507, PPP6508, PPP6509, PPP6510, and PPP6512 has been removed:

Copymembers

CPPDXBUD

Logic has been added so that an appointment with an Appointment Duration Code of 'V' is treated, for purposes of derivation of retirement code and Derived BELI, as if the appointment is indefinite. Therefore, Appointment Duration Code value of 'V' is handled in the same manner as a value of 'B' (for budgetary purposes only).

CPWSXELG

A new field for reporting the new derived BELI Indicator is added to the work record for "HOURS TOWARD BENEFITS ELIGIBILITY" Report File. The record length has been changed from 70 to 71.

Bind Members

PPOT1511

PPOT1511 is the one-time bind member for one-time program PPOT1511.

Forms

Form UPAY770 has been modified to remove the appropriate obsolete PPP650 reports.

Table Updates

DETPROD

BELI Qualification Codes of '10', '50', and '80' have been removed from the list of valid codes for data elements 0240 and 0242.

Use the transactions in CARDLIB(DETPROD), or key from the provided facsimile UPAY553 form. These transactions may be used both for testing and production, with the approval of your campus Payroll Manager.

CICS Help

CICS help members EDB0240 and EDB0242 have been modified to remove the obsolete BELI Qualification Codes of '10', '50', and '80'.

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 PPOT1511 can be used as a model to create the production one-time JCL.

The PPP130 JCL that produces the Benefits Eligibility Report File should be changed. The LRECL value related to DD PPELGRPT should be changed from '70' to '71'.

The appropriate DD Names in the JCL to execute PPP650 should be removed. Refer to the Installation Instructions document.

Timing of Installation

The installation of this release is *Date Mandated*.

The installation of this release can be installed earlier but not later than September 30, 2003.

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

Grace Chiu, et al
Page 5
August 22, 2003

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cc: Jerry Wilcox