

Service Request 80580
Unit 18 Wage Settlement (2003)
July 31, 2003
modified 8/18/2003

Approved: _____

Labor Relations

Human Resources and Benefits
Information Systems Support
Office of the President

1.0 Background

The recent contract ratification, effective June 30, 2003, between the University and the American Federation of Teachers Unit 18 (commonly referred to as 'the lecturers') requires a retroactive wage settlement:

ARTICLE 22 – WAGES

B. RETROACTIVE PAYMENT

NSF who had an active appointment in the unit during the regular 2002-2003 academic year will be eligible to receive retroactive pay. The amount of retroactive pay provided to each individual will be calculated based upon the NSF's within-unit earnings at his/her campus in accordance with Section B. of this Article.

1. FY 2000-01. Individuals who had within-unit earnings will receive an amount equivalent to 2% of their FY 2000-01 within-unit academic year earnings. NSF with an annualized salary of less than \$40K for 2000-01, will receive an additional amount equivalent to 2% of the FY 2000-01 earnings. NSF with annualized salaries of \$40K - \$80K will receive an increase of 1%.
2. FY 2001-02. Individuals who had within-unit earnings will receive an amount equivalent to 0.5% of their FY 2001-02 within unit academic year earnings.
3. FY 2002-03. Individuals who had within-unit earnings adjusted in B.1.a. or b above will have their 2002-03 within-unit earnings for FY 2002-03 adjusted by the same percentages that were allocated to their academic year earnings in B.1. and B.2., above.
4. Retroactive payment will be paid as soon as possible but in no event later than November 2, 2003.

2.0 Eligibility

To be eligible for the retroactive pay, an employee must have held an IX unit appointment during the 2002-2003 academic year, October 2002 through June 2003. UCOP Labor Relations will provide an input file specifying all eligible employees and indicating the salary level. Campuses have verified this file and made any adjustments to salary level as appropriate for employees who may have received merit increases during the period of 1999 – 2003. Salary levels identified on the file are:

- a. 1 = < 40K annually
- b. 2 = >= 40K and <= 80K annually
- c. 3 = > 80K annually

3.0 PPS Processing

A PPS retroactive adjustment process must be developed to generate the retroactive wage adjustments specified in the contract settlement. The retroactive adjustment is to be considered UCRS covered compensation and must be applied to the appropriate pay period which it adjusts.

3.1 PAR Selection

For the retroactive computation, the program should examine the PAR records that meet the follow criteria:

- PAR records with pay period end dates between:
 - October 2000 and September 2001
 - October 2001 and September 2002
 - October 2002 and June 2003, including BW periods. (Rates effective 7/1/2003 are to be provided to campuses as a Range Adjustment pay scale file.)
- PAR Title Unit Code = IX and Appointment Representation Code = C
- REG and equivalent earnings (Pay Category = N and Type Hours = R). (Note: By-Agreement salaries, including summer salary payments, will be excluded by this selection criterion.)

3.2 Transactions

For each calculated month adjustment, a “RA” type transaction should be generated. The RA should reflect the original FAU from the corresponding PAR record as well as the original pay period end date. The adjustments should be available for campuses to process according to local schedules and practice, but the adjustments must be paid no later than November 2, 2003.

3.3 Calculation

October 2000 – September 2001 Earnings Adjustment

Each individual eligible monthly PAR record:

- PAR Earnings X .04 if in the <\$40K group (Salary Level 1),
- PAR Earnings X .03 if in the >= \$40K and <= \$80K group (Salary Level 2),
- PAR Earnings X .02 if in the > \$80K group (Salary Level 3).

October 2001-September 2002 Earnings Adjustment

Each individual eligible monthly PAR record:

- (PAR Earnings X .04) + ((PAR Earnings X .04) + PAR Earnings) X .005 if in the <\$40K group,
- (PAR Earnings X .03) + ((PAR Earnings X .03) + PAR Earnings) X .005 if in the >= \$40K and <= \$80K group,
- (PAR Earnings X .02) + ((PAR Earnings X .02) + PAR Earnings) X .005 if in the > \$80K group.

October 2002-June 2003 Earnings Adjustment

Each individual eligible monthly PAR record

- (PAR Earnings X .04) + ((PAR Earnings X .04) + PAR Earnings) X .005 if in the <\$40K group,
- (PAR Earnings X .03) + ((PAR Earnings X .03) + PAR Earnings) X .005 if in the >= \$40K and <= \$80K group,
- (PAR Earnings X .02) + ((PAR Earnings X .02) + PAR Earnings) X .005 if in the > \$80K group.

Example 1 - Employee with earnings in each academic year month

Year	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Total	Factor	Retro
2000-01 PAR	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	0	0	0	9,000	4%	
+4%	40	40	40	40	40	40	40	40	40	0	0	0	360		\$360.00
2001-02 PAR	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	0	0	0	9,000 +	4% +	\$360.00 +
+X 4%	40	40	40	40	40	40	40	40	40	0	0	0	360.00		\$46.80
X .5%	5.20	5.20	5.20	5.20	5.20	5.20	5.20	5.20	5.20	0	0	0	46.80		
2002-03 PAR	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	0	0	0	9,000	4% +	\$360.00 +
+X4%	40	40	40	40	40	40	40	40	40	0	0	0	360.00	.5%	\$46.80
X .5%	5.20	5.20	5.20	5.20	5.20	5.20	5.20	5.20	5.20	0	0	0	46.80		
													\$1173.60		\$1173.60

Example 2 – Employee with limited employment during the three year period

Year	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Total	Factor	Retro
2000-01	1,000	1,000	1,000	0	0	0	0	0	0	0	0	0	3,000	4%	
X4%	40	40	40	0	0	0	0	0	0	0	0	0	120		\$120.00
2001-02	1,000	1,000	1,000	0	0	0	1,000	1,000	1,000	0	0	0	6,000	4% +	\$240.00 +
+4%	40.00	40.00	40.00	0	0	0	40.00	40.00	40.00	0	0	0	240.00	+.5%	\$31.20
X .5%	5.20	5.20	5.20	0	0	0	5.20	5.20	5.20	0	0	0	31.20		
2002-03	1,000	1,000	1,000	0	0	0	0	0	0	0	0	0	3,000	0% same as prior year	\$120.00 +\$15.60
+4%	40.00	40.00	40.00										120.00		
X .5%	5.20	5.20	5.20										15.60		
													526.80		\$526.80

Example 3 – Fiscal Year employee paid over 12 months

Year	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Total	Factor	Retro
2000-01	4477	4477	4477	4477	4477	4477	4477	4477	4477	4477	4477	4477	53724	3%	

X3%	134.31	134.31	134.31	134.31	134.31	134.31	134.31	134.31	134.31	134.31	134.31	134.31	1611.72		1611.72
2001-02	4477	4477	4477	4477	4477	4477	4477	4477	4477	4477	4477	4477	53724	3% +.5%	\$1611.72 + \$276.72
+3%	134.31	134.31	134.31	134.31	134.31	134.31	134.31	134.31	134.31	134.31	134.31	134.31	1611.72		
X.5%	23.06	23.06	23.06	23.06	23.06	23.06	23.06	23.06	23.06	23.06	23.06	23.06	276.72		
2002-03	4477	4477	4477	4477	4477	4477	4477	4477	4477				40293	0% same as prior year	1208.79 +207.54
+3%	134.31	134.31	134.31	134.31	134.31	134.31	134.31	134.31	134.31				1208.79		
X.5%	23.06	23.06	23.06	23.06	23.06	23.06	23.06	23.06	23.06				207.54		
													4916.49		4916.49

4.0 Reporting

A one-time detailed report should be provided showing the retroactive calculation by month. One copy of the report, designated for campus Academic Personnel offices, should be provided and should display the employee data listed below. The report should be sorted in order of Employee Name and display the title ‘Central Office Report of NSI Retroactive Adjustments’ (Attachment A).

- Employee ID
- Employee Name (EDB 0105)
- Home Department Number (EDB 0114) and translated department name from the Home Department Table
- Appointment Number (EDB 2001)
- Title Code (EDB 2006)
- Salary Level (from eligibility file: 1 = < 40K, 2= >= 40K but <= 80K, 3 = > 80K)
- PAR Gross & DOS Code
- PAR PP End Date
- Retroactive Calculation
- Primary Pay Schedule (EDB 0152)

The program should also produce an electronic report file in tab-delimited format. This electronic file should contain the same data as the Central Office Report described above.

Attachment A

PPPXXXX/PPPXXX 01/15/97
 RETN: SEE RPTS DISP SCHEDULE/DIST.

UNIVERSITY OF CALIFORNIA--SYSTEMWIDE
 BASE PAY CHANGES
 CENTRAL OFFICE REPORT OF NSI RETROACTIVE ADJUSTMENTS

PAGE NO. 1
 RUN DATE XX/XX/XX

EMPLOYEE NAME	EMPLOYEE ID	DEPT NAME	DEPT NUM	SALARY LEVEL	APPT NUM	TITLE CODE	PAR GROSS	DOS CODE	PP END DATE	RETRO AMOUNT	PAY CYCLE							
ATTRICK, JERRY	000050001	REPRO GRAPHICS	000456	3	10	1642	10050.00	REG	10/31/00	402.00	MO							
							10050.00	REG	11/30/00	402.00	MO							
							10050.00	REG	12/31/00	402.00	MO							
							10050.00	REG	04/30/01	402.00	MO							
							10050.00	REG	05/31/01	402.00	MO							
							10050.00	REG	06/30/01	402.00	MO							
							10050.00	REG	10/31/02	454.26	MO							
BARRET, GRIN N.	000050002	FRENCH ITAL	071789	1	10	1630	1262.00	REG	10/31/00	50.48	MO							
							1000.00	REG	10/31/00	40.00	MO							
							1262.00	REG	11/30/00	50.48	MO							
							1000.00	REG	10/30/00	40.00	MO							
							1262.00	REG	10/31/02	57.04	MO							
							1000.00	REG	10/31/02	45.20	MO							
							1262.00	REG	11/30/02	57.04	MO							
							1000.00	REG	11/30/02	45.20	MO							
							1262.00	REG	12/31/02	57.04	MO							
							1000.00	REG	12/31/02	45.20	MO							
							1262.00	REG	01/31/03	57.04	MO							
							1000.00	REG	01/31/03	45.20	MO							
							DINNER, BUFFY	000050128	FRENCH ITAL	071789	1	10	1633	1000.00	REG	10/31/00	40.00	MO
														980.00	REG	11/30/00	39.20	MO
980.00	REG	12/31/00	39.20	MO														
1000.00	REG	01/31/01	40.00	MO														
1000.00	REG	02/28/01	40.00	MO														
1000.00	REG	03/31/01	40.00	MO														
1000.00	REG	04/30/01	40.00	MO														
1000.00	REG	05/31/01	40.00	MO														
1000.00	REG	06/30/01	40.00	MO														
1000.00	REG	10/31/02	45.20	MO														