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BUSINESS AND FINANCE

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Re:	Release:	1531
	Service Request:	80551, 80591
	Error Reports	None
	Programs:	PPBENXJD, PPCOVEDB, PPCOVRGE, PPCTT14J, PPDXBENI, PPEC121, PPEC136, PPEC140, PPEC154, PPEI199, PPEI340, PPOT1531 (One-time), PPP560, PPP561
	CICS Programs	PPWRC20
	Copymembers:	CPLNKXJD
	Include Members:	None
	DDL Members:	None
	Bind Members:	PPOT1531
	CICS Maps:	None
	Forms:	UPAY714
	Table Updates:	Benefits Rates Table, Code Translation Table, Data Element Table, Gross-to-Net Table, CICS Help
	Urgency:	Date Mandated (see Timing of Installation)

This release combines two Service Requests which relate to Benefits changes for 2004.

### **Service Request 80551**

Service Request 80551 addresses the requirements for modifications to adopt the full four-tier Legal Plan Coverage Codes. For Open Enrollment 2003, Benefits changed Plan Coverage Codes from three-tiers to four tiers for medical, dental, and vision. Legal continued to be a two tiered plan, but replaced the old “Family” level code (UUU) with the new “Self + Family” code of (UAC). This service request asks that legal adopt the full four tiers. The revised four-tier legal plan coverage codes are ‘U’ (Self), ‘UA’ (Self and adult), ‘UC’ (Self and Children), and ‘UAC’ (Self and Family).

It is asked that a *one-time program* be developed to convert those employees currently enrolled in the legal plan from two-tiered coverage codes to four-tier coverage codes. The *Code Translation Table* should be updated with new code translations associated with legal coverage codes of ‘UA’ and ‘UC’. The *Coverage Level Code Derivation logic* should be changed to appropriately derive the legal plan coverage codes of ‘U’ (Self), ‘UA’ (Self and adult), ‘UC’ (Self and Children), or ‘UAC’ (Self, one adult, and one or more children).

Existing processes will need to handle the additional legal coverage codes of ‘UA’ and ‘UC’ and /or translations correctly. Although it is believed no changes are required, the following processes should be tested to ensure that unexpected interactions do not occur:

- EDB inquiry and update screens (both CICS and web)

Ensure that the revised coverage level codes are correctly displayed and translated on the EFBC, EINS, IFBC, IINS, IINP, IBNA, and IMEM CICS screens, and on the EDB Inquiry Web 'Benefits Enrollment Information' page.

- PAN

Ensure that the revised coverage level codes are correctly displayed and translated on the PAN notifications (both CICS and web).

- IDOC

Ensure that the revised coverage level codes are correctly displayed and translated on the Benefits IDOC.

- Compute

Ensure that the compute takes the correct rates for each of the legal coverage codes.

- Rush Checks

Ensure that the correct rates are taken for the legal coverage codes.

- Carrier Files

Ensure that the revised coverage level codes are correctly displayed in positions 161-163 of the Employee Record (Type 1).

- CPS/BCS

Ensure that the revised coverage level codes are correctly handled by the interfaces to the Corporate Personnel System and the Benefits Counseling System.

- HDB

Ensure that the revised legal coverage level codes are correctly processed in History.

### **Service Request 80591**

Service Request 80591 addresses the requirements for modifications to support the establishment of the new legal plan. Through the open RFP process, the University has selected the ARAG Group to provide legal services to UC employees and their eligible family members beginning January 1, 2004. Thus, it is asked that the following change be made to Payroll/Personnel System (PPS):

- Establishment of the new legal plan code of J2
- Creation of a one-time program to ensure that no residual enrollments in The Signature Legal Plan remain active for January 2004 coverage.
- Eligibility for enrollment in the legal plan is expanded from BELI 1 to BELI 1, 2, 3, and 4.

### **Differences from Requirements**

Service Request 80551 asks that a one-time be developed to convert employees currently enrolled in the legal plan from two-tiered coverage codes to the full four-tier coverage codes. That is, if the employee has only an adult enrolled in legal plan, then the 'UAC' plan coverage code should be converted to plan coverage code of 'UA'. If the employee has only a child enrolled in legal plan, then the 'UAC' plan coverage code should be converted to plan coverage code of 'UC'. Otherwise no conversion is necessary.

After further analysis, the one-time program asked of Service Request 80551 is not necessary. It is determined that the one-time program asked of Service Request 80591 should end the current existing legal plan of J1 as of December 31, 2003, and post the future legal plan of J2 to the Future Coverage Benefits Table (PPFCB) with a PCED of January 1, 2004. When January 1, 2004 is achieved, the existing daily process should move the future legal plan data to current and re-derive the legal plan coverage code at the same time. Therefore, the request to develop a one-time program to convert employees enrolled in the legal plan from two-tiered coverage codes to four-tiered coverage codes is withdrawn.

### **Programs**

#### **PPBENXJD**

Since Legal has been changed to four tier plan coverage codes, the logic that sets the Legal Coverage Code to 'UAC' when the derived coverage code is either 'UA' or 'UC' has been removed.

#### **PPCOVEDB, PPCOVRGE**

When the modules were originally developed, PPCOVEDB and PPCOVRGE already derived the Legal Coverage Code as part of the 4-tier coverage code structure ('U', 'UA', 'UC', or 'UAC'). However, since Legal plan is a two-tiered plan, and the derived code is 'UA' or 'UC', it is set to 'UAC' and passed back to calling module. That particular code has been disabled so that derived coverage code of 'UA' or 'UC' is valid and passed back to calling module.

#### **PPCTT14J**

Additional coverage codes of 'UA' and 'UC' have been included in the list of valid legal plan coverage codes. In addition, valid entry numbers of '03' and '04' have been added to the list of valid entry numbers.

#### **PPDXBENI**

Temporary code has been included in PPDXBENI to handle short term changeover problems due to coverage code changes related to J1 legal plan. That is, Legal Plan Code of J1 should have legal plan coverage code of 'U' or 'UAC'.

Therefore, temporary code has been added prior to calling the rate lookup module PPBENXJD. If the legal plan code is J1, the legal plan coverage code of 'UA' or 'UC' is set to 'UAC'. In addition, if the legal plan code is 'J2', an effective date of 01/01/04 is passed to the PPBENXJD module.

#### **PPEC121**

The edit related to the issuance of message 12-328 has been changed to issue the message only when the BELI is greater than '4'.

#### **PPEC136**

The edit related to the issuance of message 08-263 has been changed to issue the message only when the BELI is greater than '4'.

#### PPEC140

The edit related to the issuance of message 13-019 has been changed to issue the message only when the BELI is greater than '4'.

Currently, an edit exists that the old legal plan code must be blank. Otherwise the JD type transaction is rejected. This specific edit has been modified to include legal plan code of 'XC' and 'XD'.

#### PPEC154

The edit related to the issuance of messages 08-263 and 08-552 have been changed to issue the messages only when the BELI is greater than '4'.

#### PPEI199

PPEI199 performs benefits de-enrollment. If the Legal insurance de-enrollment indicator has been set "on" during the Compute Gross-to-Net process (PPP400), any suspended legal insurance balance is cleared from the employee's deduction array (EDSA-BALAMT). The first subscript for the array is a hard coded value equal to the legal plan's GTN.

PPEI199 has been changed to zero the legal suspended balance when the legal plan is 'J2'.

#### PPEI340

Currently, when there is a future legal enrollment pending, and the BELI is changed from a '1' to another value, data override level messages 08-552 and 12-552 "Future Legal Enrollment Deleted Due To BELI Change" are issued and the future legal enrollment is removed.

The edit related to the issuance of messages 08-552 and 12-552 has been changed to issue the messages only when the BELI is greater than '4'.

#### PPOT1531

This one-time program has been developed to convert employees enrolled in Signature Legal Plan (J1) to the ARAG Legal Plan (J2).

#### PPP560

Currently, a small window exists that an employee can enroll between December 1, 2003 and December 31, 2003 in the old legal plan of 'J1' with the new derived coverage code of 'UA' or 'UC'.

Temporary code has been placed in PPP560 just prior to the call to the rate lookup module PPBENXJD. If the legal plan code is J1 and legal plan coverage code is 'UA' or 'UC', the legal plan coverage code is set to 'UAC' and the effective date passed to PPBENXJD is set to 01/01/03.

#### PPP561

Temporary code has been included in PPP561 to handle short term changeover problems due to coverage code changes related to J1 legal plan. That is, Legal Plan Code of J1 should have legal plan coverage code of 'U' or 'UAC'.

Therefore, temporary code has been added prior to the call to the rate lookup module PPBENXJD. If the legal plan code is J1, legal coverage effective date is prior to 2004-01-01, and legal plan coverage code is 'UA' or 'UC', the legal plan coverage code is set to 'UAC'.

### **CICS Programs**

#### **PPWRC20**

Since Legal Plan is changed to four-tier plan coverage codes, the logic that edits the input Legal Coverage Code has been changed to include the check for Legal Coverage Codes of 'UA' and 'UC'.

### **Copymembers**

#### **CPLNKXJD**

This copymember has been changed to add 'UA' and 'UC' to the list of valid plan coverage code in KXJD-VALID-COVERAGE-CODE related to the Legal Plan to allow for Four-Tier rates.

### **Bind Members**

#### **PPOT1531 (new)**

A plan bind member has been created for one-time program PPOT1531.

### **Copymembers**

#### **CPLNKXJD**

This copymember has been modified to add 'UA' and 'UC' to KXJD-VALID-COVERAGE-CODE for legal to allow for 4-tier rates.

### **Forms**

#### **UPAY714**

Legal Plan Coverage Codes of 'UA' and 'UC' and the associated entry numbers have been added to the form. In addition, the referenced Legal Plan Code of J1 in columns 7 through 8 has been replaced with J2.

### **Table Updates**

#### **Data Element Table**

Legal Plan Code value of 'J2' has been added to the list of valid legal plan codes.

#### **Code Translation Table**

Code translations for the new 'UA' and 'UC' coverage codes have been added to the existing translated Legal Plan Coverage Codes.

#### **Gross-to-Net Table**

New Gross-to-Net numbers have been added.

- GTN 340 and GTN 341 have been established for the new Legal Plan Code of J2.

### **CICS Help**

The On-Line help entries have been modified as follows:

- EDB 0353 – Legal Plan Code of 'J2' has been added to the Code Interpretation section, and the old Legal Plan

Code of 'J1' has been made obsolete in the Code Interpretation section.

- EDB 0689 – Legal Plan Code of 'J2' has been added in the Code Interpretation section, and the old Legal Plan Code of 'J1' has been made obsolete in the Code Interpretation section.
- EDB 0354 and PAR 0354 – Legal Plan Coverage Codes of 'UA' and 'UC' have been added to the Code Interpretation section.

### **JCL (new)**

- PPOT1531

To create JCL to run one-time PPOT1531, sample JCL in PAYDIST.R1531.JCL can be used as a model.

### **Test Plan**

An installation Test Plan is provided with this release.

### **Installation Instructions**

An Installation Instructions document is provided with this release.

### **Timing of Installation**

The installation of this release is Date Mandated.

Because of the timing of installing the legal plan changes and their relationship to year-end processes, careful ordering of the installation steps is essential for correct results. The released Installation Document references the 2003 *Year-End Processing Sequence* document. The 2003 *Year-End Processing Sequence* document will be made available to the campuses when finalized. Additionally, the *Install in Production* section of the *Installation Instructions* further discusses installation order. They should be read carefully before starting the installation.

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

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