

Service Request 80718

BX Lump Sum Payment

December 15, 2003
REVISED 19-DEC-2003

1.0 Overview

The BX Lump Sum Payment program provides eligible employees with a one-time lump sum payment of:

- \$70 for employees with total eligible appointment time of 25% or more
- \$35 for employees with total eligible appointment time of less than 25%

The program includes processes for determining eligibility, generating payment and costing transactions, and reporting of lump sum payments.

2.0 Background

The new contract between the University and UAW, effective January 1, 2004, provides for a wage increase of 1.5% for all ASE titles as well a lump sum payment of either \$35 or \$70, depending upon the employee's appointment time percent on the contract ratification date (December 3 at Santa Barbara and Santa Cruz; December 4 at Berkeley Davis, Irvine, Riverside, and L.A.; December 5 at San Diego):

"A lump sum payment will be paid to ASEs on the payroll as of the date of ratification by the union -- \$70 to ASEs with an appointment of 25% or more, and \$35 to ASEs with an appointment less than 25%."

Note that due to the fluid nature of the bargaining unit, Labor Relations has decided that payout will not be limited strictly to employees with active appointments on the ratification date. Rather, an eligible employee with an active appointment during the month of December should receive the lump sum.

Academic Personnel will implement the range adjustment portion of the wage article using existing processes.

3.0 Eligibility

To receive the lump sum payment, employees must have at least one active appointment on the December month end EDB snapshot that meets the following criteria:

- Appointment Title Unit Code (EDB 2029) = 'BX', *or*
Title Code (EDB 2006) = 2270, 2271, 2272, 2273, 2302, 2303, 2312, 2313, 2330, 2331, 2340, 2341, 2520, 2854, *or* 2855
- Appointment Begin Date (EDB 2002) must not be after December 31, 2003
- Appointment End Date (EDB 2003) must not be prior to December 1, 2003

In addition, eligible employees must not have a Separation Date (EDB 0140) prior to December 1, 2003.

4.0 PPS Processing

4.1 Payment Amount Determination

For each eligible employee, the program should examine the Time-Appointment (EDB 2012) value for each active appointment that meets the selection criteria (section 3.0). If an employee has multiple appointments that meet the criteria, the program should total the Time-Appointment values.

The program should determine the payment amount as follows:

- \$70 for employees with a Time-Appointment (EDB 2012) or aggregated time of .25 or higher
- \$35 for employees with a Time-Appointment (EDB 2012) or aggregated time of less than .25

4.2 Lump Sum Payment Transactions

For employees with multiple eligible appointments, the lump sum payment should be prorated among eligible titles.

Each payment transaction should have the following attributes:

- Payroll Transaction type of 'FT'
- DOS code of 'LSN' ('Lump Sum Payment - non UCRS base building')
- Pay Period End Date of '12/05/03'
- Title Code
- fund source for the employee's eligible 'BX' appointment/distribution

If an employee is paid from multiple fund sources, the program should proportionately charge the lump sum payment(s) to all active (as of December 2003) Full Accounting Units associated with the eligible 'BX' appointment(s).

The process should categorize the lump sum payments by Primary Pay Schedule (EDB 0152) so that campuses can run the transactions into the appropriate payroll compute cycle.

4.3 Reporting

The one-time program should produce a report, sorted by either Employee Name or Employee Name within Home Department, and a tab-delimited electronic file listing the following data for each employee eligible for the lump sum payment:

- Employee Name (EDB 0105)
- Employee ID
- Employee Home Department (EDB 0114) and translated department name from the Home Department Table
- Employment Status Code (EDB 0114)
- Deduction Pay Schedule Code (EDB 0152)
- for each eligible appointment:
 - Title Code (EDB 2006) and translated title from Title Code Table
 - **Appointment Representation Code (EDB 2031) - electronic version only**
 - Time-Appointment (EDB 2012)
 - FT transaction amount(s)
 - FAU(s)

The report should also list the total of all lump sums paid. Refer to Attachments A and B for suggested layout.

4.4 Costing Transactions

The program should create standard costing transactions from the lump sum payments for input into program PPP960, the Costing Consolidation Process. This process may be modeled after program PPOT1251, which produced costing transactions for the 1999-2000 SX wage implementation.

5.0 Timing

The contract between the University and UAW does not stipulate a deadline for the lump sum payments. However, UCOP Labor Relations has informed the union that payments will be made as soon as possible, preferably before the end of January, 2004. Therefore, it is requested that the program be made available to campuses by early January, 2004.

Labor Relations

Date

Attachment A

PPPXXXX/PPPXXX XX/XX/XX
 RETN: SEE RPTS DISP SCHEDULE/DIST.

UNIVERSITY OF CALIFORNIA-SYSTEMWIDE
 PAYROLL PROCESSING
 BX LUMP SUM REPORT

PAGE NO. 1
 RUN DATE XX/XX/XX

EMPLOYEE NAME EMPLOYEE ID	HOME DEPT	STATUS	APPT%	TITLE CODE	FAU	AMOUNT
ABSENT, MARCUS 000050020	804918 CHAN OFFICE	A	0.25	2310 TEACHING ASSISTANT - GSHIP	3401920 19900 1	70.00
ALU, BOB 000050022	845001 PHYSICAL PLANT	A	0.05	2851 READER NON-GSHIP	3404918CCCC19900PROJ331	11.67
			0.10	2310 TEACHING ASSISTANT - GSHIP	3404918CCCC19900PROJ331	23.33
DINNER, BUFFY 000050128	827701 HOSP EDUC	A	0.20	2310 TEACHING ASSISTANT - GSHIP	3404918CCCC19900PROJ331 3401920 19900 1	17.50 17.50
MENTRY, ELA 000050105	827701 HOSP EDUC	P	0.25	1501 ASSOCIATE IN --ACAD YR-GHIP	3404918CCCC19900PROJ331 3401920 19900 1	42.00 28.00
SPOON, GRACIE 000050079	826301 SECURITY	S	0.10	2310 TEACHING ASSISTANT - GSHIP	3404918CCCC19900PROJ331 3401920 19900 1	14.00 14.00
			0.15	2851 READER NON-GSHIP	3404918CCCC19900PROJ331 3401920 19900 1	21.00 21.00
TOTAL						280.00

Attachment B

PPPXXXX/PPPXXX XX/XX/XX
 RETN: SEE RPTS DISP SCHEDULE/DIST.

UNIVERSITY OF CALIFORNIA-SYSTEMWIDE
 PAYROLL PROCESSING
 BX LUMP SUM REPORT

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DEPARTMENT: 822501 REPRO GRAPHICS

EMPLOYEE NAME EMPLOYEE ID	STATUS	APPT%	TITLE CODE	FAU	AMOUNT
ABSENT, MARCUS 000050020	A	0.25	2310 TEACHING ASSISTANT - GSHIP	3401920 19900 1	70.00
ALU, BOB 000050022	A	0.05	2851 READER NON-GSHIP	3404918CCCC19900PROJ331	11.67
		0.10	2310 TEACHING ASSISTANT - GSHIP	3404918CCCC19900PROJ331	23.33
DINNER, BUFFY 000050128	A	0.20	2310 TEACHING ASSISTANT - GSHIP	3404918CCCC19900PROJ331	17.50
				3401920 19900 1	17.50
MENTRY, ELA 000050105	P	0.25	1501 ASSOCIATE IN _-ACAD YR-GHIP	3404918CCCC19900PROJ331	42.00
				3401920 19900 1	28.00
SPOON, GRACIE 000050079	S	0.10	2310 TEACHING ASSISTANT - GSHIP	3404918CCCC19900PROJ331	14.00
				3401920 19900 1	14.00
				0.15	2851 READER NON-GSHIP
				3401920 19900 1	21.00
				TOTAL	280.00