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January 6, 2004

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Re:	Release:	1544
	Service Requests:	80718
	Error Reports:	None
	Programs:	PPOT1544 (one-time)
	CICS Programs:	None
	Copymembers:	None
	Include Members:	None
	DDL Members:	None
	Bind Members:	PPOT1544
	CICS Maps:	None
	Forms:	None
	Table Updates:	None
	Urgency:	Date Mandated (see Timing of Installation)

Service Request 80718

The new contract between the University and UAW (United Auto Workers), effective January 1, 2004, provides for a wage increase of 1.5% for all ASE (Academic Student Employee) titles as well as 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 UC Santa Barbara and UC Santa Cruz; December 4 at UC Berkeley, UC Davis, UC Irvine, UC Riverside, and UC Los Angeles; and December 5 at UC 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 one-time lump sum. In addition, it has been decided that both unrepresented employees in BX titles as well as employees in some unrepresented teaching titles associated with Title Unit Code of '99' should receive the 1.5% salary increase and lump sum payment.

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

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.

Payment Amount Determination

For each eligible employee, the program should examine the Time-Appointment (EDB 2012) value for each active appointment that meets the eligibility requirements above. 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

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)

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.

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.

Differences from Requirements

Service Request 80718 specified certain selection criteria to select employees eligible for the ASE lump sum payments.

It is asked that additional conditions be included in the original selection criteria. Rather than re-issue the Service Request, the additional condition will be stated here as differences from requirements.

- If the employee's Appointment Percent Full Time (EDB 2012) is equal to zero, that appointment will not be selected for processing. Thus, employees with otherwise active eligible appointments, but with zero percent appointment time will not be eligible for the lump sum payments.
- Title Codes of 2521, 2862, and 2863 will be included in the selection criteria of appointments.

Programs

PPOT1544 (new)

PPOT1544 has been developed to select eligible employees for the ASE Lump Sum payments based on the following selection criteria:

1. 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', '2521', '2854', '2855', '2862', or '2863'.
2. The Appointment Percent Full Time (EDB 2012) must not be zero.
3. The Appointment Without Salary Indicator (EDB2028) must not be Y.
4. The Appointment End Date (EDB2003) must not fall before December 1, 2003.
5. The Appointment Begin Date (EDB2002) must not fall after December 31, 2003.
6. The Separation Date (EDB0140), when present, must not fall before December 1, 2003

PPOT1544 produces two reports:

1. The BX Lump Sum Report Roster (Report OT15441). This report is in either Employee Name order or Home Department, depending upon the report sort option entered on the Specification record.
2. The BX Lump Sum Report Warning/Controls (Report OT15442). This report provides control totals, and identifies error conditions during processing.

PPOT1544 produces the following output Files:

1. Four separate "FT" transaction files are produced (one for each possible pay cycle; BW, MO, SM, MA) for processing of the lump sum payments into the Compute.
2. An electronic data file in tab delimited format is produced for FTP retrieval by UCOP Human Resources and Benefits.
3. A Costing transaction is produced for the Costing Process.

Bind Members

PPOT1544 (new)

This member defines the plan bind for one-time program PPOT1544.

Production JCL

The test JCL provided with this release to run PPOT1544 can be used as a model to create the production one-time JCL.

Test Plan

A complete test plan is provided with this release.

Installation Instructions

Installation Instructions are provided as a separate document.

Timing of Installation

The installation of this release is *Date Mandated*.

In order that all eligible employees receive the BX lump payments at or close to the same time, it is strongly encouraged that campuses process the FT pay transactions in the compute with a normal pay cycle check date closest to the end of January. That is, the MO pay cycle would have a check date of January 30, 2004, BW pay cycle would have a check date of January 28, 2003, MA pay cycle would have a check date of February 6, 2004, and SM pay cycle would have a check date of January 23, 2004. For those campuses that are paying the BX lump sum as separate checks to the eligible employees, the checks should be dated in the same range (January 23, 2004 through February 6, 2004). Thus, if campuses follow the same schedule per above, employees should receive their payment at the same time as all employees on that same pay schedule at all other locations.

The BX Electronic Report file produced by execution of the one-time program associated with this release should be delivered to UCOP via ftp as soon as practicable after all retroactive processes have been completed but not later than **February 27, 2004**. The file is to be delivered to your normal campus ftp "dropbox" account, using the dataset name

FTPUSRn.PUT.BXLUMP.Y2004, where 'n' is the one-byte campus ID.

The LRECL for this file is 149, and it will be the campus' responsibility to properly allocate space for this dataset during the ftp transfer.

As usual, campuses are encouraged to install this release in as timely a fashion as possible and in the normal numeric sequence.

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

Jackson Quan

cc: Jerry Wilcox