

**Service Request 80606**  
**Expanded Benefits Eligibility for**  
**Non-Senate Faculty (Unit IX)**  
**Detail Design**

Document Number DETAIL  
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Information Systems & Computing  
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University of California

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## **Introduction**

University of California, Human Resources and Benefits department, based up the most recent contract with the Non-Senate Faculty unit, is modifying the eligibility rules for UCRP membership for the Non-Senate Faculty (IX) unit and, because eligibility for health and welfare benefits is based in part on UCRP membership, this proposed Plan change would also result in an expansion of health and welfare eligibility for employees affected by the retirement change. In addition to the current conditions of eligibility based on the percent time and duration of the employee's appointment, an employee who is a Covered member of the IX Unit, may alternately qualify for UCRP membership and initial health and welfare eligibility by accruing 750 eligible hours on pay status in a consecutive 12 month period. Employees currently restricted from UCRP membership for other defined reasons, such as student status or per diem appointments will continue to be ineligible.

## Overview

Service Request 15210, implemented in Release 1313, provided enhancements to the Payroll/Personnel System (PPS) such that in addition to conditions of eligibility based on the percent time and duration of the employee's appointment, an employee would alternately qualify for UCRP membership and initial health and welfare eligibility by accruing 1000 eligible hours on pay status in a consecutive 12 month period. Service Request 80606 requests that Covered members of the Non-Senate Faculty (Unit IX) be considered eligible for retirement and health and welfare benefits by accruing **750 eligible hours** on pay status in a consecutive 12 month period. The changes are summarized in the following list. Detailed specifications are provided in the subsequent sections of this document.

1. A mechanism for identifying the minimum number of hours required for retirement and health and welfare eligibility and a reporting threshold will be provided in PPS for Covered members of the Non-Senate Faculty (Unit IX).
2. EDB Monthly Maintenance will need several enhancements:
  - a. It will determine if the Non-Senate Faculty employee has reached the required number of hours for UCRP Eligibility, and if so, set the Retirement Code and FICA Eligibility Code appropriately.
  - b. It will determine if the employee is eligible for benefits, and if so, set the BELI and enroll the employee in default plans.
3. EDB Explicit Maintenance will need the following enhancement:

Currently, when an employee is rehired, the system examines the Hours Toward Benefits Eligibility data elements and determines how many hours the employee worked in the 12-month period prior to the month of rehire. If the numbers of hours equals or exceeds the minimum required hours for benefits eligibility, and the Covered member of the Non-Senate Faculty is otherwise eligible, the employee's record should indicate retirement and FICA eligibility, and eligibility for career-level health and welfare benefits.
4. Reports will be provided to identify Covered members of the Non-Senate Faculty who achieved the 750 eligible hours and were put into UCRP, and also to identify employees approaching the number of hours that will qualify them for UCRP and benefits eligibility.

## Programs

### PPEI205

PPEI205 calls PPFICRET to derive Retirement Code and FICA Eligibility Code.

PPEI205 is executed unconditionally during PPP130 Monthly Periodic Maintenance, and conditionally during explicit EDB maintenance when trigger I205 is on. Action Codes 01 (Hire) and 02 (Rehire) set I205 on, among others.

It currently calls PPFICRET during Monthly Periodic Maintenance if program PPCB01 has identified an appointment beginning or ending in the new month, or if the Retirement/FICA Derivation Indicator indicates a pending Rehire for which derivation was deferred. It currently calls PPFICRET unconditionally during explicit EDB maintenance, presuming the I205 trigger is on.

PPEI205 will be modified to also call PPFICRET during Monthly Periodic Maintenance if the Total Hours Toward Benefits Eligibility has achieved the minimum required, as defined by System Parameter 036 and the employee is a Covered member of the Non-Senate Faculty.

During Monthly Periodic Maintenance PPEI205 executes after PPEM005 (on the Base PGT) which will update the Total Hours Toward Benefits Eligibility. PPEM005 will set HRS-BEN-ELIG-ACHIEVED-750 in CPWSSWCH to true when appropriate.

During explicit maintenance PPEM005 will not have run, so evaluation of the current Total Hours Toward Benefits Eligibility must be performed in PPEI205. Code will be added to access System Parameters 036 and 037 the first time PPEI205 is called. System Parameter 036 will define the minimum number of hours required for benefits eligibility. System Parameter 037 will define a reporting threshold prior to achievement of eligibility. A threshold reporting value will be calculated as the value of System Parameter 036 minus the value of System Parameter 037. If HRS-BEN-ELIG-TOT-750 is equal to or greater than System Parameter 036, HRS-BEN-ELIG-ACHIEVED-750 will be set to true.

For both Monthly Periodic Maintenance and explicit maintenance, if HRS-BEN-ELIG-ACHIEVED-750 is true, 88 value PPFICRET-HRS-BEN-ELIG-ACHIEVED (see copymember CPLNKFIC) will be set to true. PPFICRET will be called for possible Retirement and FICA derivation.

If PPFICRET is called, it will pass back PPFICRET-BEN-ELIG-DERIVE-SW (see copymember CPLNKFIC) which will indicate whether or not UCRP enrollment occurred **due to achieving the 750 hour limit**. If it has, 88 value PPFICRET-BEN-ELIG-U-DERIVED will have been set to true in PPFICRET. If so, PPEI205 will set HRS-BEN-UCRP-ENROLLED in CPWSSWCH to true.

If UCRP enrollment occurred for any reason during Monthly Periodic Maintenance, Action Code 22 is established.

If the value of HRS-BEN-ELIG-ACHIEVED-750 is not true, but HRS-BEN-ELIG-TOT is equal to or greater than the calculated reporting threshold value and the employee holds at least one active IX Covered appointment, the new 88 value CURR-APPT-EXISTS-750 in CPWSSWCH will be set to true. PPFICRET will **not** be called.

### PPEI206

PPEI206 performs implied maintenance for medical, dental and vision benefits enrollment for employees who were enrolled in UCRP due to achievement of 1000 Hours Toward Benefits Eligibility. It calls program PPELGRPT to report those employees who have been enrolled, or who have not been enrolled but who have achieved the threshold for reporting. It will now check HRS-BEN-ELIG-ACHIEVED-750 and BENS-ELIG-APPT-EXISTS-750 to determine benefits enrollment for eligible employees who were enrolled in UCRP due to achievement of 750 Hours Toward Benefits Eligibility in the same manner as for Benefits Enrollment based upon the 1000 hours rule.

**PPELGRPT**

PPELGRPT, called during monthly periodic maintenance, will write records for the two new reports of Covered members of the Non-Senate Faculty enrolled in benefits and employees approaching benefits eligibility. See Attachments D and E.

The report record file is read by program PPP138.

**PPP138**

PPP138 reads the benefits enrollment report records written by PPELGRPT and produces reports.

PPP138 will be modified such that it produces two new reports based upon the field XELG-REPORT-CODE indicating which report the record should be written to. This key will be set in PPELGRPT based on PPELGRPT-HRS-BEN-ELIG-ENRL-750 or XELG-REPORT-THRESHOLD-750 being true.

See Attachments A and B for report samples. In addition, the standard errors and messages report will be produced.

## Copymembers

### CPLNKELG

CPLNKELG defines the linkage between calling programs and report program PPELGRPT. Two additional 88 level values will be added to identify the two new reports to be produced in Program PPP138.

```
05 PPELGRPT-ELIGIBILITY-STATUS PIC X(01).
   88 PPELGRPT-HRS-BEN-ELIG-ENROLLED VALUE 'E'.
   88 PPELGRPT-HRS-BEN-ELIG-THRESHLD VALUE 'T'.
   88 PPELGRPT-HRS-BEN-ELIG-ENRL-750 VALUE 'A'.
   88 PPELGRPT-HRS-BEN-ELIG-THRS-750 VALUE 'B'.
```

Two programs use this copymember in calls. PPP130 which uses it in OPEN and CLOSE mode. Program PPEI206 uses it in WRITE mode.

### CPWSSWCH

CPWSSWCH defines various switches that are used across modules as an EXTERNAL. Switch HRS-BEN-ELIGIBILITY-SW will be modified to convey the results of eligibility processing based upon 750 hours, in PPEI205 and PPFICRET to PPEI206. Switch HRS-CURR-APPT-750-SW will be modified to convey the results of testing whether or not an employee has an active IX Covered Appointment. The switch values will determine whether PPEI206 performs benefits enrollment and/or reporting.

```
05 HRS-BEN-ELIGIBILITY-SW PIC X(01).
   88 HRS-BEN-ELIG-NOT-ACHIEVED VALUE ' '.
   88 HRS-BEN-ELIG-ACHIEVED VALUE 'E'.
   88 HRS-BEN-ELIG-THRESHOLD VALUE 'T'.
   88 HRS-BEN-ELIG-ACHIEVED-750 VALUE 'A'.
   88 HRS-BEN-ELIG-THRESHOLD-750 VALUE 'B'.
   88 HRS-BEN-UCRP-ENROLLED VALUE 'U'.
```

```
05 HRS-BENS-ELIG-APPT-SW-750 PIC X(01).
   88 BENS-ELIG-APPT-EXISTS-750 VALUE 'Y'.
   88 NO-BENS-ELIG-APPT-750 VALUE 'N'.
```

```
05 HRS-CURR-APPT-750-SW PIC X(01).
   88 CURR-APPT-EXISTS-750 VALUE 'Y'.
   88 NO-CURR-APPT-EXISTS-750 VALUE 'N'.
```

The copymember has a large filler field which will be decremented by the length of the new field. Therefore the length of the copymember is not affected. Programs that use the copymember as an External, but do not reference the new fields, do not require recompilation.

### CPWSXELG

CPWSXELG defines working storage for the eligibility reporting record written out by PPELGRPT and read in by new program PPP138. It will be modified to contain 88 level values to indicate which of the two new reports should be written to.

```
*01 XELG-RECORD.
   05 XELG-REPORT-CODE PIC X(02).
      88 XELG-REPORT-ENROLLED VALUE '01'.
      88 XELG-REPORT-THRESHOLD VALUE '02'.
      88 XELG-REPORT-ENROLLED-750 VALUE '03'.
      88 XELG-REPORT-THRESHOLD-750 VALUE '04'.
```

## **Table Updates**

### **System Parameter Table (PPPPRM)**

Two new System Parameters will be added.

System Parameter 36 will define the total Hours Toward Benefits Eligibility for Covered members of the Non-Senate Faculty which will trigger derivation of Retirement and Welfare Benefits coverage. It will initially be set to 750 hours.

System Parameter 37 will define a threshold for total Hours Toward Benefits Eligibility for Covered members of the Non-Senate Faculty which will trigger reporting of employees approaching derivation of Retirement and Welfare Benefits coverage. It will initially be set to 240 hours.

## **JCL**

### **PPP138**

JCL will be modified for the two new reports produced by PPP138.

- PPP1384 for EMPLOYEES WITH 750 HOURS - RETIREMENT SET TO "U"
- PPP1385 for EMPLOYEES APPROACHING 750 ELIGIBLE HOURS

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Attachments

Attachment A Sample Report: EMPLOYEES WITH 750 HOURS - ELIGIBLE FOR BENEFITS  
Attachment B Sample Report: EMPLOYEES APPROACHING 750 HOURS TOWARD BENEFITS  
ELIGIBILITY

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PPP1384/PPP138/121003  
 RETN: SEE RPTS DISP SCHEDULE/DIST.

UNIVERSITY OF CALIFORNIA-SYSTEMWIDE  
 PAYROLL PROCESSING  
 EMPLOYEES WITH 750 HOURS - ELIGIBLE FOR BENEFITS

PAGE NO. 000001  
 RUN DATE 01/17/04

DEPARTMENT: 804918 CHANCELLORS OFFICE

EMP ID	NAME	HRS TOWARD ELIGIBILITY	EMP STATUS	HIRE DATE	RETIREMENT/FICA CODES BEFORE	AFTER	ASSIGNED BELI BEF/AFT	DERIVED BELI BEF/AFT
111111132	DALE, KATHY	750.00	Inactive	01/01/03	H/M	U/E	3/1	3/1
111111128	DALE, SUSAN	1000.00	Inactive	01/01/03	H/M	U/E	3/1	3/1
111111122	DIXON, JANE	816.00	Active	01/01/03	H/M	U/E	3/1	3/1
111111107	NEWHOUSE, MARIA	926.40	Active	01/01/03	H/M	U/E	5/1	U/1

TOTAL EMPLOYEES FOR DEPARTMENT: 4

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PPP1385/PPP138/121003

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PAGE NO. 000001

RETN: SEE RPTS DISP SCHEDULE/DIST.

PAYROLL PROCESSING

RUN DATE 01/17/04

EMPLOYEES APPROACHING 750 HOURS TOWARD BENEFITS ELIGIBILITY

DEPARTMENT: 804918 CHANCELLORS OFFICE

EMP ID	NAME	HRS TOWARD ELIGIBILITY	EMP STATUS	HIRE DATE	RETIREMENT/FICA CODES	ASSIGNED BELI	DERIVED BELI BEF/AFT
111111106	BURNS, MAY	696.40	Active	01/01/03	H/M	5	U/
111111100	CLARK, ANNA	676.40	Active	01/01/03	H/M	4	U/
111111110	CLARK, MACY	566.00	Active	01/01/03	H/M	4	3/
111111123	DIXON, MARY	326.00	Active	01/01/03	H/M	3	3/
111111108	LITTLE, MARY	675.40	Active	01/01/03	H/M	3	U/
111111121	NIXON, JANE	586.00	Active	01/01/03	H/M	3	3/
111111102	NIXON, MARY	567.00	Active	01/01/03	H/M	4	3/
111111125	SMITH, ALEXIS	400.00	Inactive	01/01/03	H/M	3	3/
111111101	SMITH, ANNA	566.00	Active	01/01/03	H/M	4	3/
111111124	SMITH, MARIA	325.00	Active	01/01/03	H/M	3	3/
111111103	SMITH, MAY	565.00	Active	01/01/03	H/M	4	3/
111111104	SMITH, NANCY	566.00	Inactive	01/01/03	H/M	4	3/

TOTAL EMPLOYEES FOR DEPARTMENT: 12