

Created on: April 15, 2004
Updated May 7, 2004

SR 80846 Requirements RX Range-to-Step Conversion

Objective:

This one-time range-to-step conversion program places eligible RX employees in open range titles on an appropriate new step. In addition, the program takes existing employees who are already in half step RX titles and place them on an appropriate whole step.

The program includes the following processes:

- selection of EDB distributions to be modified
- assignment of new steps and rates
- generation of EDB update and costing transactions
- reporting of modifications

Project Type:

This is a one-time PPS program.

Requested by:

Human Resources & Benefits, Labor Relations

Analyst:

Carrie Gatlin

Due Date(s):

This program is date mandated.

It is requested that the program be provided to the campuses in early June so that they may implement the RX range-to-step conversion in time for the July 1, 2004 deadline (July earnings).

Background:

The contract between The University and UPTE Research Support Professionals Unit (RX), effective June 30, 2004, stipulates that all open range employees in the bargaining unit be placed onto a step structure as of July 1, 2004:

The University will implement a step structure of 2% steps for all open-range employees in the unit, effective July 1, 2004. Placement on steps will be to the amount equal to then-current salary or the next highest step.

The new step-based structure will be calculated at 2% intervals within the ranges. The parties recognize that the actual salary range for each classification will vary slightly due to rounding.(Article 6, Compensation)

The RX step structure implemented will be based on whole step intervals (1.0, 2.0, 3.0, etc.). Employees currently in RX titles with half step structures (9613, 9644, 9724) must also be converted to the new whole step structure.

Note: The contract between The University and the UPTE Technical Unit (TX) contains similar language, with the notable difference that while RX will have a whole step structure, TX titles will remain on half steps. Requirements for the TX range-to-step conversion will be detailed in a separate Service Request.

Current Process:

There is currently no automated process to convert open range employees to a step-based structure. When necessary, this is accomplished via a manual process in accordance with local practices.

Proposed Process:

Prior to installing and running the range-to-step program, campuses must first complete local TCT maintenance to establish the new step rates for the previously open range titles and the whole steps for the previously half step titles.

The program will examine the EDB for appointments, and then specific distribution lines, that match the selection criteria (see section 1.0 below). For each distribution line to be modified, the program will query TCT (or a smaller table composed of effected titles and their rates) to find the covered rates for the appointment Title Code. Among these step rates, the program will search for a new rate that is equal to or greater than the employee's current rate (see section 2.0 below) and generate update transactions to assign the new steps and rates in the EDB.

Requirements

1.0 Appointment and Distribution Selection

The program should select eligible appointments based on the following criteria:

- Employee Separation Date (EDB 0140) is not prior to the July 1, 2004;
- Title Unit Code (EDB 2029) = 'RX', and:
 - Appointment End Date (EDB 2003) is not prior to July 1, 2004;
 - Appointment Representation Code (EDB 2031) = 'C' ('Covered');
 - Appointment Without Salary Indicator (EDB 2028) is not equal to 'Y';

From the eligible appointments, the program should select distributions where the Description of Service (DOS) code has a Payment Category value of 'N' ('Normal or Regular Pay') and a Type Hours value of 'R' ('Regular'), 'O' ('Overtime Straight'), or 'P' ('Overtime Premium').

2.0 Assignment of New Steps and Rates

For distributions eligible to be modified, the program should query TCT based on the effective date of July 1, 2004 (or query a smaller table of effected titles and rates that the program constructs) to compare the covered rates (Pay Representation Code = 'COV') for the appointment Title Code (EDB 2006) to the current Distribution Pay Rate (EDB 2055) associated with the distribution.

The program should first attempt to find a rate associated with the Title Code that is equal to the current Distribution Pay Rate. If it finds a match, the program should determine the associated step number for the pay rate and assign this rate and step number to the new distribution.

Note that the program must determine, based on the number of pay intervals, what the correct whole step number value should be (1.0, 2.0, 3.0, etc.).

If it does not find a match, the program should identify the first rate in the step sequence that is greater than the current Distribution Pay Rate and assign this rate and associated step number to the new distribution. If the program does not find a rate that is higher than the current rate (i.e. the current Distribution Pay Rate is higher than the top step rate for the title), the program should assign the top step number and the current Distribution Pay Rate to the new distribution. Additionally, for these distributions where the Distribution Pay Rate is higher than the top step rate, and the current distribution's Off/Above Scale code (EDB 2050) is blank, the Off/Above Scale code for the new distribution should be set to 'R' ('Red circle, non-academic'). If the current Off/Above Scale value is not blank, that value should be transferred unchanged to the new distribution.

3.0 EDB Update Transactions

The program must generate EDB transactions to update appointment distributions for effected employees. The transaction should terminate the current distribution and establish a new distribution entry with the new rate and Salary Step (EDB 2049). Distributions that cross the effective date boundary of 07/01/04 (monthly) or 07/04/04 (biweekly) should be terminated as of one day prior to the effective date. The

transaction should then create a new distribution with a begin date equal to the monthly or biweekly effective date and an end date equal to the original end date of the terminated distribution. For distributions with a begin date later than the effective date, the transaction should simply update the pay rate to the new rate and assign the correct Salary Step value.

The update transactions should use Personnel Action Code '43 - change in rate - other'.

4.0 Costing Transactions

The program should create standard costing transactions for input into program PPP960, the Costing Consolidation Process. These transactions may be modeled after the costing transactions created by program PPP910, Range Process.

Campuses will determine whether '43' is a costable action locally, and whether it needs to be added to the costable action table.

5.0 Reporting

The one-time program should produce a report and electronic data file detailing the pay changes for each employee converted from open range to step rates or converted from a half step structure to a whole step structure. Two versions of a report should display the employee data listed below. One should be sorted in order of Employee Name and display the title 'Central Office Report of Range-to-Step Conversion – RX' (Attachment A). The other version should be sorted by Employee Name within Department and display the title 'Departmental Report of Range-to-Step Conversion - RX' (Attachment B).

- Employee ID
- Employee Name (EDB 0105)
- Home Department Number (EDB 0114) and translated department name from the Home Department Table
- Appointment Number (EDB 2001)
- Time-Appointment (Anticipated) (EDB 2012)
- Title Code (EDB 2006)
- Starting Rate
- New Step (EDB 2049)
- New Rate
- Off/Above Scale Indicator (EDB 2050)
- Primary Pay Schedule (EDB 0152)
- Description of Service (DOS) Code (EDB 2056)
- Percent Change - the difference between the starting rate and the new rate, expressed as a percentage of the starting rate

The program should also produce an electronic 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 RANGE-TO-STEP CONVERSION - RX

PAGE NO. 1
 RUN DATE XX/XX/XX

EMPLOYEE NAME/ EMPLOYEE ID/	DEPARTMENT NAME	DEPT NUM	APPT NUM	APPT %	TITLE CODE	STARTING RATE	NEW STEP	NEW RATE	O/A SCALE	PAY CYCLE	DOS CODE	PERCENT CHANGE
DINNER, BUFFY 000050128	HOSP EDUC	827701	10	0.30	9610	5000.00	4.0	5050.00		MO	REG	1.0
						5000.00	4.0	5050.00		MO	REG	1.0
EMPLOYEE, TEST12 111111112	CHAN OFFICE	804918	20	1.00	9612	1680.00	5.0	1697.00		MO	REG	1.0
						1680.00	5.0	1697.00		MO	RTP	1.0
FRANKLIN, RICHARD M 701000004	BUDGET OFFICE	861001	10	0.30	9613	3008.00	5.0	3038.00		MO	REG	1.0
						3008.00	5.0	3038.00		MO	RTP	1.0
						3369.00	4.0	3403.00		MO	REG	1.0
						3369.00	4.0	3403.00		MO	REG	1.0
						3124.00	5.0	3124.00	R	MO	REG	0.0
						3124.00	5.0	3124.00	R	MO	REG	0.0
						3124.00	5.0	3124.00	R	MO	REG	0.0
JOHNSON, MALCOLM P	CHAN OFFICE	804918	10	1.00	9520	13.0100	3.0	13.2500		BW	REG	1.8

Attachment B

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

UNIVERSITY OF CALIFORNIA-SYSTEMWIDE
 BASE PAY CHANGES
 DEPARTMENTAL REPORT OF RANGE-TO-STEP CONVERSION - RX

PAGE NO. 1
 RUN DATE XX/XX/XX

DEPARTMENT: 827701 HOSP EDUC

EMPLOYEE NAME/ EMPLOYEE ID/	APPT NUM	APPT %	TITLE CODE	STARTING RATE	NEW STEP	NEW RATE	O/A SCALE	PAY CYCLE	DOS CODE	PERCENT CHANGE
DINNER, BUFFY 000050128	10	0.30	9610	5000.00	4.0	5050.00		MO	REG	1.0
				5000.00	4.0	5050.00		MO	REG	1.0
EMPLOYEE, TEST12 111111112	20	1.00	9612	1680.00	5.0	1697.00		MO	REG	1.0
				1680.00	5.0	1697.00		MO	RTP	1.0
FRANKLIN, RICHARD M 701000004	10	0.30	9613	3008.00	5.0	3038.00		MO	REG	1.0
				3008.00	5.0	3038.00		MO	RTP	1.0
	20	0.40	9612	3369.00	4.0	3403.00		MO	REG	1.0
				3369.00	4.0	3403.00		MO	REG	1.0
	30	0.30	9724	3124.00	5.0	3124.00	R	MO	REG	0.0
				3124.00	5.0	3124.00	R	MO	REG	0.0
				3124.00	5.0	3124.00	R	MO	REG	0.0
JOHNSON, MALCOLM P	10	1.00	9520	13.0100	3.0	13.2500		BW	REG	1.8