

Created on: June 25, 2004  
Last Modified on: August 11, 2004  
SR80961-DependentEditPayroll.doc

## **SR80961 Requirements Modify Dependent Edit in Payroll**

### **Objective:**

This service request addresses requirements to change the Payroll/Personnel System (PPS) resulted from two legislation changes made in 2003 and 2004 (see Background section for more information about the Legislation). In addition, it addresses changes in eligibility for some disabled children:

- 1) Modify PPS to support the enrollment of opposite sex domestic partners, their children and grandchildren.
- 2) Modify PPS to allow eligible children of employees who reside in New Mexico to remain in Medical, Dental and Vision plans through age 25.
- 3) Modify PPS to support the enrollment of non-tax dependent disabled children

### **Project Type:**

This is an upgrade to the Payroll/Personnel System (PPS).

### **Requested by:**

Mark Esteban, Director  
Policy & Program Design, H&W

### **Analyst:**

Rowena Wong  
Alice Plebuch

### **Due Date(s):**

These changes to Payroll are Date Mandated. The release must be installed on the campuses prior to the receipt of the Open Enrollment transactions in early December, 2004.

**Background:**

This service request addresses requirements to implement two legislation changes:

- 1) The California Domestic Partner Rights and Responsibilities Act of 2003 (AB 205) takes effect on January 1, 2005. This legislation specifies that registered domestic partners shall have the same rights, protections, and benefits of spouses. Domestic partnership may be constituted if one or both of opposite sex partners meets the criteria of Social Security and is over the age of 62. In implementing AB205 at the University of California, Health & Welfare Policy has decided on a slightly more liberal enrollment policy than the legislation. Employees with an opposite-sex domestic partner may use the same interdependency criteria as same-sex domestic partners.
- 2) SB457 of New Mexico took effect on January 1, 2004. This legislation requires health plan sponsors to allow eligible dependents to remain in non-self funded health plans through age 25. The legislation applies to employees who live in New Mexico.
- 3) HR&B Policy has determined that health and welfare coverage should be extended to overage disabled children receiving Social Security Disability Income. These children are currently de-enrolled as they are not tax dependents.

**Current Process:****Domestic Partner**

Currently, the employee can have either a domestic partner or a spouse but not both. And the domestic partner must be of the same sex as the employee. There also are special edits on age for domestic partner requiring both the domestic partner and the employee be at least 18 years of age.

**SB457 De-enrollment of Child Attaining 25 Years of Age**

Currently, a family member with a relationship of child (C), other child (O), stepchild (P), grandchild (G) and child/grandchild of domestic partner (K) is automatically de-enrolled at age 23, unless they are disabled.

**Overage Disabled Child who is not tax dependent.**

Currently, an overage disabled child is manually de-enrolled when the child is no longer a tax-dependent. According to the tax dependency regulations, a child receiving Social Security disability income (SSI) cannot be a tax-dependent.

**Proposed Process:****Opposite Sex Domestic Partner**

A new code 'L' will be used to identify an opposite sex domestic partner. With the exception of the age edits listed below, and the differing gender rules, an opposite sex domestic partner will be treated identically to same sex domestic partners. The California Domestic Partner Registry may be used to validate the relationship. The University's contribution to the opposite sex domestic partner's medical, dental or vision plan is subject to Federal imputed income and, when not enrolled in the California State Domestic Partner Registry, subject to California State imputed income.

The employee can have either a domestic partner or a spouse but not both. The domestic partner can be same sex or opposite sex. If the domestic partner is the same sex as the employee, the special edits on age require both the domestic partner and the employee be at least 18 years of age. If the domestic partner is

the opposite sex of the employee, the special edits on age require (a) both the domestic partner and the employee be at least 18 years of age and (b) one of the opposite sex partners be over the age of 62.

Children and grandchild of an opposite sex domestic partner may be enrolled in health and welfare plans under the code “K”, child/grandchild of domestic partner. No change is required to the code “K”.

SB457 — Age Limit for Children of Employees Residing in New Mexico.

For employees who live in New Mexico, a dependent who has a relationship of a child (C), other child (O), stepchild (P), grandchild (G) or child/grandchild of domestic partner (K) will not automatically be de-enrolled from a medical, dental or vision plan until they reach 25. These children will continue to be de-enrolled from a legal plan at age 23. In addition, if the medical plan is self-funded, they must be manually de-enrolled at age 23.

#### Non Tax-Dependent Overage Disabled Children

Disabled children who are eligible for Social Security Disability income (SSI) will not be de-enrolled from health and welfare benefits when they obtain age 23. So long as the child remains on SSI, benefits eligibility will continue. Enrollment will be a manual process (no web enrollment) with the employee being required to produce documentation. Since the University’s contribution to medical, dental or vision premiums will be subject to imputed income, it is necessary to establish a new relationship code to take advantage of existing imputed income processes. Likewise, to take advantage of existing overage process, the disabled code ‘Y’ will continue to be used for the Dependent De-enrollment Control Code.

<a href="#">1.0</a>	<a href="#">Control Table Updates</a>	5
<a href="#">2.0</a>	<a href="#">Data Elements</a>	5
<a href="#">3.0</a>	<a href="#">EDB Maintenance</a>	5
<a href="#">3.1</a>	<a href="#">Explicit Maintenance</a>	5
<a href="#">3.1.1</a>	<a href="#">Range and Value Edits</a>	5
<a href="#">3.1.2</a>	<a href="#">Consistency Edits</a>	6
<a href="#">3.2</a>	<a href="#">Periodic Maintenance</a>	8
<a href="#">3.2.1</a>	<a href="#">Monthly Maintenance</a>	8
<a href="#">4.0</a>	<a href="#">History Process</a>	9
<a href="#">5.0</a>	<a href="#">Compute Process Changes</a>	9
<a href="#">5.1</a>	<a href="#">Imputed Income for Opposite Sex Domestic Partners</a>	9
<a href="#">5.2</a>	<a href="#">Imputed Income for Non-tax Dependent Disabled Children</a>	9
<a href="#">6.0</a>	<a href="#">Interface Files</a>	9
<a href="#">7.0</a>	<a href="#">Forms</a>	9
<a href="#">8.0</a>	<a href="#">Reporting and Notification</a>	9
	<a href="#">Appendix A- Data Element EDB0635</a>	11
	<a href="#">Appendix B- Data Element EDB0638</a>	12

## Requirements:

### 1.0 Control Table Updates

#### System Messages

Add new messages:

- 1) "DE-ENROLL CONTROL CODE NOT VALID, DEPENDENT IS 25 OR OLDER"
- 2) "DOMESTIC PARTNER NOT ALLOWED – EE AND PARTNER UNDER AGE 62"
- 3) "DOMESTIC PARTNER NOT ALLOWED – EE OR PARTNER IS UNDER AGE 18"
- 4) "USE 'D' FOR SAME SEX DOMESTIC PARTNER"
- 5) "USE 'L' FOR OPPOSITE SEX DOMESTIC PARTNER"
- 6) "DE-ENROLL CONTROL CODE NOT VALID, EE NOT RESIDENT OF NEW MEXICO"
- 7) "DE-ENROLL CONTROL CODE NOT VALID, DEPENDENT IS NOT A CHILD"
- 8) "DEPENDENT LEGAL ENROLLMENT BLOCKED BECAUSE AGE IS 23 OR OLDER"
- 9) "ENROLLMENT ALLOWED ONLY IN INSURED MEDICAL PLANS"
- 10) "NOT TAX DEP DISABLED CHILD MUST HAVE DISABLED INDICATOR SET TO Y"

#### Code Translation (CTT)

CTT values must be updated on the CTT table for the Opposite Sex Domestic Partner:

EDB0635 L 20 Opp Domestic Partner  
EDB0635 N 20 Non-Tax Dep DisChild  
EDB0638 M 23 NM Dependent Over 23

### 2.0 Data Elements

Modification to the following data elements:

1. EDB0635 – Dependent Relationship to employee code (Appendix A)  
Add "L – Opposite Sex Domestic Partner" to valid values.  
Add "N — Non-Tax Dependent Disabled Child" to valid values
2. EDB0638 – Dependent De-enrollment Control code (Appendix B)  
Add "M – New Mexico Dependent over 23" to valid values.

### 3.0 EDB Maintenance

#### 3.1 Explicit Maintenance

##### 3.1.1 Range and Value Edits

Add the following to the list of valid values to the EDB0635, Dependent Relationship to Employee Code:

"L - Opp Domestic Partner"  
"N – Non-Tax Dep Disabled Child"

Add the following to the list of valid values for EDB0638, Dependent De-enrollment control Code:

"M — New Mexico"

Current validity edits can be use when an illegal value is entered on the EDEP Entry/Update screen. The transaction should be rejected and the following error message should be issued:

“FIELD OUT OF RANGE OR ILLEGAL VALUE”

### 3.1.2 Consistency Edits

#### Dependents Relationship Edit

A Social Security Number is required when adding a domestic partner. The existing edit for domestic partner SSN can be updated to include Opposite Sex Domestic Partner. When the Social Security Number for an Opposite Sex Domestic Partner is missing, issue warning message 08-478 and 12-478, “SSN IS MISSING FOR DOMESTIC PARTNER”.

Employees can have either a domestic partner or a spouse but not both. And the domestic partner can be of the same sex as the employee or opposite sex. Existing edit for spouse and domestic partner can be update to include Opposite Sex Domestic Partner to ensure that only one Dependent record per employee with a Dependent Relationship to Employee code value of ‘D’, ‘L’ or ‘S’. The addition of or change to another dependent record resulting in the record having a relationship code value of ‘D’, ‘L’ or ‘S’ should be blocked and a message issued with severity level of Employee Reject on-line. These messages should have a severity of Warning in batch in order to allow for add and delete in the same batch.

Below are the Relationship edit and error messages:

Existing Dependent Relationship	Add/Change Dependent Relationship	Message ID	Message
S	D	08-532/12-532	SPOUSE ENROLLED: DOMESTIC PARTNER CANNOT BE ADDED
S	L	08-532/12-532	SPOUSE ENROLLED: DOMESTIC PARTNER CANNOT BE ADDED
S	S	08-530/12-530	SPOUSE ALREADY ENROLLED: SPOUSE CANNOT BE ADDED
D	D	08-531/12-531	DOMESTIC PARTNER ENROLLED: DOMESTIC PARTNER CANNOT BE ADDED
D	L	08-531/12-531	DOMESTIC PARTNER ENROLLED: DOMESTIC PARTNER CANNOT BE ADDED
D	S	08-533/12-533	DOMESTIC PARTNER ENROLLED: SPOUSE CANNOT BE ADDED
L	D	08-531/12-531	DOMESTIC PARTNER ENROLLED: DOMESTIC PARTNER CANNOT BE ADDED
L	L	08-531/12-531	DOMESTIC PARTNER ENROLLED: DOMESTIC PARTNER CANNOT BE ADDED
L	S	08-533/12-533	DOMESTIC PARTNER ENROLLED: SPOUSE CANNOT BE ADDED
A	L	08-781/12-781	MAY NOT ENROLL BOTH DOMESTIC PARTNER & ADULT DEPENDENT RELATIVE

Since a domestic partner can be of the same sex as the employee or opposite sex, update the existing edits for domestic partner to allow enrollment of an Opposite Sex Domestic Partner.

If the Dependent Relationship to Employee code (EDB0635) value is ‘D’ and the Dependent Sex code (EDB0637) is different form the Employee Sex code (EDB0108), then update to the dependent record should be blocked.

Issue new message “USE ‘L’ FOR OPPOSITE SEX DOMESTIC PARTNER”. The message should have a severity level of Employee Reject for on-line transactions and Transaction Reject in batch.

If the Dependent Relationship to Employee code (EDB0635) value is ‘L’ and the Dependent Sex code (EDB0637) is the same as the Employee Sex code (EDB0108), then update to the dependent record should be blocked.

Issue new message “USE ‘D’ FOR SAME SEX DOMESTIC PARTNER”. The message should have a severity level of Employee Reject on-line and Transaction Reject in batch.

The edit that issues existing message 08-535 and 12-535, “DOMESTIC PARTNER OF OPPOSITE SEX NOT ALLOWED” is no longer needed. The edit and the message can be removed.

### **Opposite Sex Domestic Partners Age Edit**

Age edits should be added for opposite sex domestic partners. Verify that both the domestic partner and the employee are at least 18 years of age and that either is at least 62 years of age.

When the Dependent Relationship to Employee code value is ‘L’, compare the Dependent Medical/Dental/Vision Coverage Effective Date to dependent’s birthdate (EDB0634).

If dependent age is less than 62, compare the Dependent Medical/Dental/Vision/Legal Coverage Effective Date to employee’s birthdate (EDB0107).

If **neither** the employee **nor** the same sex domestic partner is over 62, new message, “DOMESTIC PARTNER NOT ALLOWED – EE AND PARTNER UNDER AGE 62” will be issued.

If one of the opposite sex domestic partners is age 62 or over, compare the Dependent Medical/Dental/Vision/Legal Coverage Effective Date to the other partner’s birthdate. If the other partner is younger than 18, new message, “DOMESTIC PARTNER NOT ALLOWED – EE OR PARTNER IS UNDER AGE 18” will be issued.

These messages should have a severity of Employee Reject on-line and Transaction Reject in batch.

### **New Mexico Age Limits Edit**

Provide a new edit that prevents the entry of an “M” in the Dependent De-enrollment Control Code (EDB0638) unless the Address-Permanent-Sate-EDB (EDB0207) is “NM”. Issue the following message “DE-ENROLL CONTROL CODE NOT VALID, EE NOT RESIDENT OF NEW MEXICO”

Provide a new edit that prevents the entry of an “M” in the Dependent De-enrollment Control Code (EDB0638) when the relationship is for an adult family member (If Dependent Relationship to Employee code (EDB0635) = “S”, “A” ‘D’ or ‘L’. Issue the following message “DE-ENROLL CONTROL CODE NOT VALID, DEPENDENT IS NOT A CHILD”

These messages should have a severity of Employee Reject on-line and Transaction Reject in batch.

Modify age edits for dependent children<sup>1</sup> that block enrollment in plans once the child reaches age 23 **unless** the De-enrollment Control Indicator (EDB0638) has a value of ‘Y’ (disabled child).

---

<sup>1</sup> Child Dependent Relationship Code:

C = Child (natural or adopted)

UCOP HRB, Information Systems Support

SR80961

Page 7 of 12

When the De-enrollment Control Indicator (EDB0638) has a value of “M” enrollments should be evaluated as follows:

Medical – If the child has obtained age 23, but is less than 25  
Issue new message: “ENROLLMENT ALLOWED ONLY IN INSURED MEDICAL PLANS”.  
This message should have a severity of “Warning”.

Medical, Dental and Vision — If the child has obtained age 25  
Issue new message: “DE-ENROLL CONTROL CODE NOT VALID, DEPENDENT AGE IS 25 OR OLDER”. This message should have a severity of Employee Reject on-line and Transaction Reject in batch.

Legal — Continue to de-enroll children at age 23. Issue new message, “DEPENDENT LEGAL ENROLLMENT BLOCKED BECAUSE AGE IS 23 OR OLDER” This message should have a severity of Employee Reject on-line and Transaction Reject in batch.

### **Non-tax Dependent Overage Disabled Children Edit**

Non-tax Dependent Overage Disabled Children ‘N’ will be required to have the De-enrollment Control Indicator (EDB0638) set to Disabled ‘Y’. If the Relationship Code (EDB0635) = ‘N’, and EDB0638 = ‘Y’. Issue new message: “NOT TAX DEP DISABLED CHILD MUST HAVE DISABLED INDICATOR SET TO Y”. This message should have a severity of Employee Reject on-line and Transaction Reject in batch.

## **3.2 Periodic Maintenance**

### **3.2.1 Monthly Maintenance**

Currently, if a child dependent (EDB0635 = C, O, P, G, or K) is going to become 23 years old in either the month of the SCR Current Date or in the month following the SCR Current Date, and the Coverage Effective Date (EDB0639) is not initial values, and the Dependent De-enrollment Control Code (EDB0638) is not ‘Y’, the Medical Dependent Coverage End Date (EDB0659), Dental Dependent Coverage End Date (EDB0656), Vision Dependent Coverage End Date (EDB0657) and Legal Dependent Coverage End Date (EDB0658) will be set equal to the last day of the month in which the child turns 23.

This code will be modified to provide additional processing for the De-enrollment Control Indicator (EDB0638) = ‘M’.

If a child dependent (EDB0635 = C, O, P, G, or K) is going to become 23 years old in either the month of the SCR Current Date or in the month following the SCR Current Date, and the Coverage Effective Date (EDB0639) is not initial values, and the Dependent De-enrollment Control Code (EDB0638) = ‘M’, Legal Dependent Coverage End Date (EDB0658) will be set equal to the last day of the month in which the child turns 23.

If a child dependent (EDB0635 = C, O, P, G, or K) is going to become 25 years old in either the month of the SCR Current Date or in the month following the SCR Current Date, and the Coverage Effective Date

---

O = Other Child (e.g., foster child)

P = Stepchild

G = Grandchild

K = Child/Grandchild of Domestic Partner

N = Non-Tax Dependent Disabled Child (note, they should have a De-enrollment Code Indicator = ‘Y’)

(EDB0639) is not initial values, and the Dependent De-enrollment Control Code (EDB0638) = 'M', the Medical Dependent Coverage End Date (EDB0659), Dental Dependent Coverage End Date (EdB0656) and Vision Dependent Coverage End Date (EDB0657) will be set equal to the last day of the month in which the child turns 25.

#### **4.0 History Process**

Validate that the new relationship codes are captured in History.

#### **5.0 Compute Process Changes**

##### **5.1 Imputed Income for Opposite Sex Domestic Partners**

Modify imputed income calculations so that Opposite Sex Domestic Partners (L) is the same as the calculation for Same Sex Domestic Partners (D).

When the Relationship Code is 'L' or 'D' and the State Declaration of Domestic Partnership is "Y", that the University's contributions for medical, dental and vision premiums are not subject to California imputed income. In addition, the TIP amount should not be lessened since the full reduction applies. See Release 1418 for further details on the existing process.

When the Relationship Code is 'L' or 'D', the University's contributions to medical, dental and vision premiums are subject to Federal imputed income. See Release 1418 for further details on the existing process.

#### **ORCA/RUSH CHECKS**

Verify that online ORCA/rush check process processes pay correctly for opposite sex domestic partner whose State Declaration of DP = Y.

##### **5.2 Imputed Income for Non-tax Dependent Disabled Children**

Modify imputed income calculations so that Non-tax Dependent Disabled Child 'N' is treated the same as for a Child/Grandchild of Domestic Partner 'K' that is subject to both State and Federal imputed income. See Release 1418 for further details on the existing process.

#### **6.0 Interface Files**

The new dependent relationship code 'L' and the new Dependent De-Enrollment Code 'M' should be recognized as a valid value in the following interfaces:

CPS Interface File  
UCRS Payroll Activity File  
IVR/Web Extract File Layout  
Carrier Files

#### **7.0 Forms**

The UPAY 850 (R10/03) Enrollment, Change, Cancellation or Opt-Out — For Employees Only form should be modified to include the new relationship codes. UCOP Benefits will coordinate the required changes to this form.

#### **8.0 Reporting and Notification**

Report PPP8801, PPP8802, PPP8803, and PPP8804 report family members as they approach the de-enrollment age and pending de-enrollment of the dependents. Reports should be modify, if needed, to report child dependents who turn 23 in the coming month with Dependent De-enrollment Control Code (EDB0638) not equal to 'M' or 'Y' and child dependents who are going to turn 25 in the coming month with Dependent De-enrollment Control Code (EDB0638) equal to "M".

## Appendix A- Data Element EDB0635

*System Number: EDB0635*

*User Access Name: 0635-4*

*Programming Name: DEP\_REL\_TO\_EMP IN PPPDEP*

*Revision Date: 04/01/98*

### *Comments*

Location(s): BCS 4213 - Dependent Relationship to Employee Code

*Name: DEPENDENT RELATIONSHIP TO EMPLOYEE CODE*

*Type: ALPHANUMERIC*

*Length: 1*

### *Format*

N/A

### *General Description*

Code indicating the familial relationship of the dependent to the employee.

### *Code Interpretation*

S	- Spouse
C	- Child (natural or adopted)
O	- Other Child (e.g., foster child)
P	- Stepchild
W	- Legal ward
G	- Grandchild
D	- Domestic Partner
L	- Opposite Sex Domestic Partner
K	- Child/Grandchild of Domestic Partner
A	- Adult Dependent Relative
N	- Non Tax-dependent Overage Disabled Child

## **Appendix B- Data Element EDB0638**

**System Number: EDB0638**

**User Access Name: 0638-7**

**Programming Name: DEP\_DISABLED\_CODE IN PPPDEP**

**Revision Date: 04/01/98**

### **Comments**

Location(s): BCS 4217 - Disabled Code-Dependent (Not Spouse)

**Name: DEPENDENT DE-ENROLLMENT CONTROL CODE**

**Type: ALPHANUMERIC**

**Length: 1**

### **Format**

N/A

### **General Description**

Code indicating whether the dependent of the employee is eligible to be covered for benefits past the usual de-enrollment age.

### **Code Interpretation**

Y	- Yes, disabled Child, Stepchild, Other Child, or Child/Grandchild of Domestic Partner
N	- No, not disabled
blank	- Not disabled, not ineligible for Medicare
I	- Ineligible for Medicare (applies to Adult Dependent Relative only)
M	- New Mexico Dependent over 23