



OFFICE OF THE SENIOR VICE PRESIDENT —  
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Re:	Release:	1615
	Service Request:	16933, 16935
	Error Reports:	None
	Programs:	PPP500, PPP520, PPP530, PPP536, PPP562, PPP565
	Copymembers:	CPFDXEDF, CPWSXCBF, CPWSXEDR, CPWSXEXP, CPWSXIC5, CPWSXSBS
	Include Members:	None
	DDL Members:	None
	Bind Members:	PPP536
	CICS Maps:	None
	Forms:	None
	Table Updates:	System Messages Table, System Parameter Table
	Urgency:	Date-Mandated (see Timing of Installation)

**Release 1605** (Phase I of Postdoctoral Scholar changes) contained the first release addressing implementation of benefits for postdoctoral scholars. That release contained the one-time program for checking DOS codes for inconsistencies, on-going EDB DOS Code edits, BELI derivation related to Postdoctoral Scholars, Insurance Reduction Indicator edit related to Postdoc Scholars, and edits for tax treaty income codes. In addition, the BELI Derivation process (PPPBELI) contains temporary code specifically for the monthly maintenance to begin December process.

**Release 1607** (Phase II of Postdoctoral Scholar changes) contained the one-time program to set the Assigned BELI (EDB0360) to 'P' for those Postdoctoral Scholars whose Derived BELI (EDB 0375) is 'P', EDB File Maintenance edits for Assigned BELI and postdoc medical, dental, and vision plans, EDB Daily Maintenance process, and EDB Monthly Periodic Maintenance process. In addition, a one-time was provided to produce a separate open enrollment carrier file for postdoc plans.

**Release 1612** (Phase III of Postdoctoral Scholar changes) contained modifications to the Monthly Carrier File Process, Consolidated Billing and Self Billing Processes, Compute (includes Rush Checks) and Expense Distribution. In addition, specific modules in the EDB File Maintenance Process are modified to include new field 'YTD-FELLOWSHIP-GRS' to the HDA Array in the portion related to gross amounts.

This release addresses the following service request:

### **Service Request 16933**

In May 2003, President Richard Atkinson (Emeritus) announced Academic Personnel Policy 390-Postdoctoral Scholars (Postdoc). This policy applies to the Postdoc-Employee, the Postdoc-Fellow and Trainee paid through

University accounts, and the Postdoc-Fellows and Trainees, funded from fellowships or trainee-ships, paid directly to the individual. The new policy provides for consistent treatment for both the Postdoc-Employee and the Postdoc-Fellow or Trainee.

In response to Academic Personnel Policy 390-Postdoctoral Scholars (Postdoc), representatives from the University of California, Office of the President (UCOP)-Academic Advancement, UCOP Human Resources and Benefits (HR/B), and UCOP Financial Management have met and discussed with campus Graduate Division representatives at various intervals the topics relating to the administration of Postdoctoral Scholar Benefits Plan (PSBP). The document addresses the modifications needed in the Payroll/Personnel System (PPS) to accommodate the special coding needed for PSBP as it encompasses and affects the Postdoc-Employee (TC 3252), the Postdoc-Fellow (TC 3253), and the Postdoc-Paid Direct (TC 3254).

In order to incorporate Postdocs into the EDB as a unique group, new values should be added to the Benefits Eligibility Level Indicator (BELI), Description of Service Table, and Gross-to-Net Table. New health and welfare plan codes should be added to distinguish the PSBP from the existing University H&W plans. [A separate document was prepared to describe the required changes needed in order to add the new benefit plans and the new BELI value "P-Postdoctoral Scholar Eligibility."]

The payroll computation process should be modified so that Postdoc-Fellows (TC 3253) and Postdoc-Paid Directs (TC 3254) can have their PSBP premiums processed through a payroll compute cycle. The fellowship/scholarship payments made to Non-Resident Aliens should be recorded in a separate gross field for reporting at year-end. Additionally, the Postdoc should be included in the Enrollment File process and the new PSBP plans should be added to the Self-Billing and Consolidated Billing processes.

The Distribution of Payroll Expense process should be modified so that it can identify and record the Postdoc benefits by unique Object Codes. Further, other reporting processes, such as the Corporate Personnel System and the Corporate Financial System, should be modified to identify Postdoctoral appointees. Modifications to the Form W-2 and Form 1042-S processes will be discussed in separate documents.

Due to the complexity of the changes and their interrelationship to each other, the above changes have been released in phases.

Release 1615 (Phase IV of Postdoctoral Scholar changes) contains consolidated billing and expense distribution changes applicable to January's month-end process (run in early February).

### **Programs**

#### **PPP500**

PPP500 has been modified to derive the Postdoc Highest (DOS) Priority Gross and associated Priority Indicator and place these values on the Postdoc individual's Consolidated Benefit Activity (CBA) record. Also, PPP500 has been modified to derive work codes which designate whether Title Codes 3252, 3253, and 3254 are present on PAR distribution entries (with associated Earnings Dates in the current process month). These new indicators, also including a current month DOS PDW indicator, will also be included on the CBA record.

#### **PPP520**

Program PPP520 is modified to assess and create departmental charges for the four new Postdoc benefits and to place these benefits amounts on the EDW File:

1. PSBP Disability. This flat rated benefit is developed for the individual when the BELI value is "P" and PAR earnings for Title Code 3252, 3253, or 3254 are present with an Earnings Date in the current process month. The monthly flat benefit amount resides in System Parameter #190.
2. PSBP Broker/Administration Fee. This flat rated benefit is developed for the individual when a Postdoc Health Contribution (GTN 626 or 628; per CPWSXIC5) is present, the BELI value is "P", and PAR earnings for Title Code 3252, 3253, or 3254 are present with an Earnings Date in the current process month. The monthly flat benefit amount resides in System Parameter #188.
3. PSBP Life/AD&D. This flat rated benefit is developed for the individual when the BELI value is "P" and PAR earnings entries for Title Code 3252, 3253, or 3254 are present with an Earnings Date in the current process month. The monthly flat benefit amount will reside in System Parameter #189.
4. PSBP PDW Workers' Compensation. This flat rated benefit is developed for the individual when the BELI value is "P" and any PAR earnings entries for DOS "PDW" are present with an Earnings Date in the current process month. The monthly flat benefit amount resides in System Parameter #192.

For various considerations related to these, as well as other benefits, refer to Detail Design.

#### PPP530

Program PPP530 has been modified to appropriately process the new postdoc benefits both in terms of reporting and GL entry issuance. For these new Postdoc benefits, the Object Code for the departmental GL entry, as well as the balance sheet FAU for the Location total benefit credit, will be taken from those values contained in CPWSXIC5.

#### PPP536

Logic has been added to create a Self Billing Statement record for Postdoc University-Paid Short Term Disability, and a Self Billing record for Postdoc University-Paid Life/AD&D.

Each record contains a record ID (Object Code), rate, total premium amount and number of "lives". No employee level detail is reported.

#### PPP562

Release 1612 incorporated the Postdoc Employee-Paid Supplemental Disability into the Consolidated Billing process.

Logic has been added to include the Postdoc University-Paid Short Term Disability and the Postdoc University-Paid Life Insurance/AD&D to the Benefits Deduction Register report PPP5623 and to the Self Billing Statement File.

#### PPP565

Currently, PPP565 creates five different Self Billing Statement files and consolidates them into a single file for FTP purposes. It is noted that Release 1612 added logic to write the SBS Postdoc Employee-Paid Supplemental Disability record to the single consolidated FTP File with a record ID of '05'.

Logic has been added to include the SBS Postdoc University-Paid Disability record (record ID of '05'), and the SBS Postdoc Life/AD&D record (record ID of '06') to the single Consolidated FTP file.

#### Copymembers

### CPFDXEDF

This copymember provides the File Definition of the Expense Distribution Work (EDW) File. The length is expanded to accommodate the addition of four new benefit amounts.

### CPWSXEDR, CPWSXEXP

These copymembers provide record layouts of the Expense Distribution Work (EDW) record. Four new benefit amounts will be added:

- Postdoc Disability
- Postdoc Life/AD&D
- Postdoc Broker/Administration Fee
- Postdoc Workers' Compensation (for PDW)

### CPWSXCBF

This copymember provides the record layouts of the Consolidated Benefit Activity record. The new Postdoc Highest Priority Indicator and Gross, as well as various work indicators has been added to previously defined Filler within the record.

### CPWSXIC5

This copymember provides Installation Constants for the Expense Distribution process. Object Codes and Balance Sheet accounts (FAU) have been added for the four new Postdoc benefits (i.e., Disability, Life/AD&D, Broker, and Workers' Comp for PDW). Note that the Object Code & Balance Sheet FAU for the PDW Workers' Comp will be the same as for standard Workers' Compensation).

### CPWSXSBS

This copymember provides the Working Storage record layout for the Self Billing Statement Tab delimited record/file. A section for the Postdoc Life/AD&D benefit has been added.

## **Bind Members**

### PPP536

This Bind member contains plan bind statements for PPP536. Program PPPRMUT2 was added to the member list.

## **JCL Changes**

### PPP562

JCL has been modified to add DD Name of SBSPSL with a LRECL of '120' and RECFM of 'FBA' for the output SBS Postdoc University-Paid Life/AD&D File.

### PPP565

JCL has been modified to add DD Name of SBSPSL for the input SBS Postdoc Life/AD&D File.

## **Table Updates**

### System Messages Table

Message 52-067 (related to December, 2004 startup) is deleted.

### System Parameter Table

The following System Parameters will be utilized during the release modified expense process:

- Parameter 188 (new) defines the value of the monthly PSBP Broker/Administration Fee.
- Parameter 189 (issued in Release 1607 but changed in this current release) defines the value of the monthly PSBP Life/AD&D benefit.
- Parameter 190 (issued in Release 1607 but changed in this current release) defines the value of the monthly PSBP Disability benefit.
- Parameter 192 (new) defines the value of the monthly PSBP Workers' Compensation charge for PDW.

### **Test Plan**

A separate Test Plan document is provided with this release.

### **Installation Instructions**

A separate Installation Instructions document is provided with this release.

### **Timing of Installation**

The installation of this release is Date-Mandated.

This release must be installed for January, 2005, month-end processing (i.e., run in early February).

*Note that this release is the one referenced in step 32 of the Year End Processing Sequence document online at <http://www.ucop.edu/payroll/documents/YearEnd2004.pdf>.*

Refer to the installation instructions document for complete details.

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

If there are any questions, please send electronic mail to [Jim.Tuohig@ucop.edu](mailto:Jim.Tuohig@ucop.edu), or call (510)987-0741.

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