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Re:	Release:	1625
	Service Request:	16961
	Programs:	PPDXBENI, PPEC102, PPEC115, PPEC120, PPEC133, PPEC134, PPEC135, PPEC151, PPEC152, PPEC153, PPEC160, PPEC165, PPEC707, PPEC724, PPEC743, PPEC753, PPEI340, PEI350, PPEI505, PPEM102, PPFCBBEN, PPIIVR, PPP560, PPP650, PPP711, PPP882, PPWEFBC, PPWEINS, PPWIFBC, PPWIFBD, PPWIINP, PPWIINS, PPWRC20
	Copymembers:	None
	Include Members:	None
	DDL Members:	None
	Bind Members:	None
	CICS Maps:	None
	Forms:	None
	Table Updates:	Data Element Table, System Messages Table, CICS Help
	Urgency:	Not Urgent (see Timing of Installation)

This release addresses the following service request:

Service Request 16961

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 Postdoctoral 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 postdoctoral medical, dental, and vision plans, EDB Daily Maintenance process, and EDB Monthly Periodic Maintenance process. In addition, a one-time is provided to produce a separate open enrollment carrier file for postdoctoral 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.

Release 1615 (Phase IV of Postdoctoral Scholar changes) contained modifications to the Expense Distribution Process to include four new benefit charges (Postdoctoral UC-Paid Short Term Disability, Postdoctoral UC-Paid Life/AD&D, Postdoctoral UC-Paid Broker/Administration Fee, and UC Paid Workers' Compensation for Postdoctoral Without Salary (PDW) individuals. Modifications to the Consolidated Billing process included Postdoctoral UC-Paid Short Term Disability, Postdoctoral UC-Paid Life/AD&D, and Postdoctoral Individual-Paid Supplemental Disability to the billing procedures.

Service Request 16961

Background

During the initial implementation of benefits (Service Request 16935) for postdoctoral scholars, some campuses reported a problem when enrollments were processed in error for postdoctoral scholars who did not select benefits. The erroneous enrollments could not be backed out because of an unfortunate combination of edits:

- Edits existing prior to the implementation of postdoctoral scholar benefits do not allow medical, dental, and vision enrollments to be deleted; instead, they require that benefits be end dated, or that a plan code of 'XC' be used to cancel, or 'XX' be used to opt out.
- New edits for postdoctoral scholar benefits do not allow the use of 'XC' (cancel) or 'XX' (opt out) for individuals eligible for postdoctoral scholar benefits (BELI 'P').

The only correction available was to end date the enrollment on the same date as the effective date. This is an imperfect solution because the system will still reflect an enrollment of one day in the plan, and this will result in reporting on carrier files and in the consolidated billing process.

The Payroll/Personnel System (PPS) must be modified to provide a way to back out enrollments in the postdoctoral scholar benefits plans that are made in error. Three possible solutions were analyzed:

- Allow a value of 'XC' (cancel) in the medical, dental, and vision plan codes fields when the BELI is 'P'
- Allow the user to delete the medical, dental, and vision data when the BELI is 'P'
- Support a new value such as 'XE' to indicate an error correction

A decision was made that allowing a value of 'XC' would be the easiest to accomplish in a short time frame, and would also provide a solution that was most consistent with existing processing for non-postdoctoral enrollments.

PPS Modification

The EDB Maintenance process should be modified so that a value of 'XC' (cancel) is allowed in the current and future Medical, Dental, and Vision Plan Code fields.

Currently a value of 'XC' is not allowed in the Vision Plan Code because 'XC' is not defined as a valid value on the Data Element Table. This edit will need to be changed from a range/value edit to a consistency edit. The new edit should allow a value of 'XC' for the Vision Plan Code when the Assigned BELI is 'P'; if the BELI is not 'P', an error message should be issued. The message should have a severity of 'Employee Reject' in batch and on-line.

The year-end process which defaults 'XC' enrollments into 'CM' medical coverage should be modified to bypass this default when the Assigned BELI is 'P'.

In addition, any other processes that contains logic referencing Vision Plan Codes of 'XX' or 'XD' should include Vision Plan Code of 'XC'.

Therefore, this release contains modifications in PPS (Payroll/Personnel System) to allow canceling of the Postdoctoral Scholar Medical, Dental, and Vision Plans using a Plan Code of 'XC'.

Programs

PPDXBENI

The existing logic containing the conditional statement to determine whether to bypass the current vision plan data on the PPPFCB Table when the vision plan code is 'XX' or 'XD' is modified to include plan code of 'XC'.

PPEC102

This module has been modified to bypass logic that changes the medical plan code of 'XC' to 'DM' when the PIE is later than today's date for Postdoctoral Scholars.

PPEC115

This module has been modified to bypass logic that changes the dental plan code of 'XC' to 'DD' when the PIE is later than today's date for Postdoctoral Scholars.

PPEC120

This module has been modified to bypass logic that changes the vision plan code of 'XC' to 'DV' when the PIE is later than today's date for Postdoctoral Scholars.

In addition, other modifications have been made as follows:

- The existing logic containing the conditional statement to determine whether to bypass the current vision plan data edits when the plan code is 'XX' or 'XD' has been modified to include plan code of 'XC'.
- Logic has been added to allow a Postdoctoral Scholar with a BELI of 'P' to cancel vision via 'XC', but not for Non-Postdoctoral Scholars.

PPEC133

To prevent message 12-631(BELI NOT P – NOT ELIGIBLE FOR POSTDOC MEDICAL) from erroneously being issued when the BELI is changed from 'P' to another value, and the postdoctoral medical plan is end-dated, this module has been modified as follows:

- The conditional statements containing (BELI-IND NOT = 'P', AND SAVE-BELI-IND NOT = 'P', AND HLTH-PLAN = ('P1' OR 'P2')) also includes condition (IF HEALTH-COVEND-DATE = XDC3-LOW-ISO-DATE).

PPEC134

To prevent message 12-632 (BELI NOT P – NOT ELIGIBLE FOR POSTDOC DENTAL) from erroneously being issued when the BELI is changed from 'P' to another value, and the postdoctoral dental plan is end-dated, this module has been modified as follows:

- The conditional statements containing (BELI-IND NOT = 'P', AND SAVE-BELI-IND NOT = 'P', AND DENTAL-PLAN = ('P3' OR 'P4')) also includes condition (IF DENTAL-COVEND-DATE = XDC3-LOW-ISO-DATE).

PPEC135

To prevent message 12-633 (BELI NOT P – NOT ELIGIBLE FOR POSTDOC VISION) from erroneously being issued when the BELI is changed from 'P' to another value, and the postdoctoral vision plan is end-dated, this module has been modified as follows:

- The conditional statements containing (BELI-IND NOT = 'P', AND SAVE-BELI-IND NOT = 'P', AND VIS-PLAN = 'P5' also includes condition (IF VISION-COVEND-DATE = XDC3-LOW-ISO-DATE).

In addition, this module will be modified as follows:

- The existing logic containing the conditional statement to determine whether to bypass the current vision plan data on the PPPFCB Table when the plan code is 'XX' or 'XD' will be modified to include plan code of 'XC'.
- Logic will be added to allow a Postdoctoral Scholar with a BELI of 'P' to cancel vision via 'XC', but not for Non-Postdoctoral Scholars. If 'XC' is entered for a Non-Postdoctoral Scholar (BELI not = 'P'), message 08-690 (CANNOT CANCEL EMPLOYEE VISION PLAN - USE 'XX' TO OPT OUT), will be issued.

PPEC151

This module has been modified as follows:

- Logic has been added to allow a Postdoctoral Scholar with a BELI of 'P' to set up a future medical plan code of 'XC'.

PPEC152

This module has been modified as follows:

- Logic has been added to allow a Postdoctoral Scholar with a BELI of 'P' to set up a future dental plan code of 'XC'.

PPEC153

This module has been modified as follows:

- Logic has been added to allow a Postdoctoral Scholar with a BELI of 'P' to set up a future vision plan code of 'XC'.
- An edit has been added to prevent entering a future vision plan code of 'XC' when the BELI is not 'P'. Message 08-691 (FUTURE PLAN CODE OF 'XC' NOT VALID FOR NON-POSTDOC EMPL) is issued.

PPEC160

The conditional statement which sets the No-Vision-Benefits when the Vision Plan is 'XD' has been modified to include the 'XC' plan code.

PPEC165

This module has been modified to allow the user to enter a plan code of 'XC' for postdoctoral medical, dental, and vision. The medical, dental, and vision edits related to the issuance of message 08-641 (DO NOT USE 'XC' TO CANCEL POSTDOC PLAN - USE END DATE) have been removed.

PPEC707

The conditional statements which contain the vision plan codes of 'XX' or 'XD' have been modified to include the plan code of 'XC'.

PPEC724

The conditional statement which contains the vision plan codes of 'XX' or 'XD' has been modified to include the plan code of 'XC'.

PPEC743

The conditional statements which contain the vision plan codes of 'XX' or 'XD' have been modified to include the plan code of 'XC'.

PPEC753

The conditional statements which contain the vision plan codes of 'XX' or 'XD' have been modified to include the plan code of 'XC'.

PPEI340

The conditional statements which contain the vision plan codes of 'XX' or 'XD' have been modified to include the plan code of 'XC'.

In addition, temporary code has been removed.

PPEI350

The conditional statements which contain the vision plan codes of 'XX' or 'XD' have been modified to include the plan code of 'XC'.

PPEI505

The conditional statement which contains the vision plan codes of 'XX' or 'XD' has been modified to include the plan code of 'XC'.

PPEM102

This module has been modified such that a postdoctoral scholar whose medical plan is 'XC' and a BELI of 'P' is not be enrolled into 'CM' medical plan for month-to-begin December.

PPFCBBEN

The conditional statement which contains the vision plan codes of 'XX' or 'XD' has been modified to include the plan code of 'XC'.

PPIIVR

The conditional statement which contains the vision plan codes of 'XX' or 'XD' has been modified to include the plan code of 'XC'.

PPP560, PPP650, PPP711, PPP882

The conditional statement which contains the vision plan codes of 'XX' or 'XD' has been modified to include the plan code of 'XC'.

PPWEFBC, PPWEINS, PPWIFBC, PPWIFBD, PPWIINP, PPWIINS, PPWRC20

The conditional statements which contain the vision plan codes of 'XX' or 'XD' will be modified to include the plan code of 'XC'.

Table Updates

Data Element Table

Trigger value of 165 has been added to the existing Consistency Edit values for EDB 0347 related to Card-Type of 'VP'.

Vision Plan Code of 'XC' has been added to the existing list of valid Vision Plan Codes for EDB 0347 and EDB 0686.

System Messages Table

Messages 08-690 and 12-690 (CANNOT CANCEL EMPLOYEE VISION PLAN – USE 'XX' TO OPT OUT), and messages 08-691 and 12-691 (FUTURE PLAN CODE OF XC NOT VALID FOR NON-POSTDOC EMPL) have been added to the table.

Existing messages 08-641 and 12-641 (DO NOT USE 'XC' TO CANCEL POSTDOC PLAN - USE END DATE) have been removed from the table.

CICS Help

Vision Plan Code of 'XC' is added to the Code Interpretation section of the on-line CICS Help (EDB 0347 and 0686) as well as the Data Dictionary Entries for EDB 0347 and EDB 0686.

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 Not Urgent.

It is highly suggested that campuses, who have individuals classified as Postdoctoral Scholars, install these set of changes which provides a way to back out enrollments in the postdoctoral scholar benefits plans that are made in error via the plan code of 'XC'.

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 Jackson.Quan@ucop.edu, or call at (510) 987-0464.

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