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Re:	Release:	1677
	Service Requests:	16977 & 16978
	Error Report:	None
	Programs:	PPEC111, PPOT1677
	Copy Members:	CPWSW88S
	Include Members:	PPPV400B
	DDL Members:	None
	Bind Members:	PPOT1677
	CICS Maps:	None
	Forms:	None
	Table Updates:	CICS HELP, CTT, MSG
	JCL Changes:	None
	Urgency:	Date Mandated

This release addresses the following service requests, SR#16977 and SR#16978:

## **Service Request 16977**

### **Purpose**

The purpose of this SR is to request that "JA" (Japan) be removed from the list of valid values for Citizenship Status Code value "A".

### **Overview**

Internal Revenue Publication 515, Withholding of Tax on Nonresident Aliens and Foreign Entities, For Withholding in prior years, stated the following:

- Nonresident aliens from Canada, Japan, Mexico, and South Korea (Citizenship Status Code (DE 0109) value "A") may claim more than one withholding allowance and must request that additional Federal tax withholding of \$7.60 per week (\$33.10 per month) be withheld.

The new tax treaty between the United States and Japan, which was ratified on March 30, 2004, does not allow residents of Japan to claim Federal tax withholding allowances for their spouses or dependents. However, nonresident alien employees could choose to apply the old treaty in its entirety for 2005. This choice was available only for 2005. Therefore, beginning January 1, 2006 residents of Japan may no longer claim Federal withholding allowances for their spouses or dependents.

### **Current Process**

Currently nonresident aliens from Japan have the Citizenship Status Code value "A" and the Country of Residency (DE 0143) value "JA" established on their EDB records. These employees may claim more than one Federal withholding allowance. Additionally, these individuals have the additional Federal tax withholding automatically established on their Employee Data Base (EDB) records.

### Requested Changes

Effective January 1, 2006 nonresidents from Japan are no longer allowed to claim Federal withholding allowances for their spouse and dependents. Therefore, employees with a Citizenship Status Code value "A", and a Country of Residency value "JA" should be changed to Citizenship Status Code value "N". The Federal withholding allowance (EDB 0128) should be changed to "1" from its current value if it exceeds "1". Please note there is no change to the Marital status (DE 0127) which is currently set at "S" for Citizenship Status Code value "N" and "A", or the additional Federal tax withholding (GTN 301) which is automatically established.

The following edit changes should be made:

- The edit associated with messages 08-459 and 12-238 should be modified so that "JA" is not a valid Country of Residency (EDB0143) for Citizenship Status Code (EDB0109) "A". The severity of these messages needs to be changed from *Informational* to *Employee Reject*
- The edit associated with messages 08-499 and 12-499 should be modified so that "JA" is a valid Country of Residency (EDB0143) for Citizenship Status Code (EDB0129) "N".

The following 08 and 12 message texts should be modified to remove "JA":

- 08-459 Country of Origin Must Be CA, MX, **JA**, KS for Citizen Code A
- 08-499 Country Code CA, **JA**, KS, MX not valid with Citizen Code N
- 12-238 Country of Origin Must Be CA, MX, **JA**, KS for Citizen Code A
- 12-499 Country Code CA, **JA**, KS, MX not valid with Citizen Code N
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The on-line help text for Citizenship Status Code (EDB0109) "A" should be modified to remove Japan ("JA") from the list of countries valid for code "A".

The one-time process to switch the EDB records of specific nonresident aliens should be based on the following criteria:

- Select employees with a Citizenship Status Code value "A" and a Country of Residency value "JA". The Citizenship Status Code value should be changed to "N". Please note that there is no change to the Country of Residency value.
- If the Federal tax withholding allowance exceeds "1" (one), the Federal withholding should be changed to "1". Please note that if the current Federal withholding allowance is "0" (zero) it should remain "0".
- Employee records should be selected for employees with Employee Status A, N, P, S or I.

This one-time should produce an employee change file so that a record of changed records is provided. The layout of the report to be produced can be seen in Attachment 1 of the Service Request.

### Service Request 16978

#### **Purpose**

The purpose of this Service Request is to request that an additional visa value be supported in the PPS.

#### **Overview**

On September 2, 2005, the Department of State added the E3 visa to the list of valid nonimmigrant classifications. The E3 visa classification applies only to nationals of Australia, their spouses, and children.

#### **Requested Change**

It is requested that a new value be added to EDB data element 0110, Visa Type Code.

<u>Visa Type Code</u>	<u>Description</u>
E3	Principal Visa holder and dependents from Australia

It was discovered that the lists of Visa Type Codes and Descriptions in the (1) Code Translation Table, (2) CICS HELP and (3) the Data Dictionary are inconsistent. There is also some inconsistency between (1) CICS HELP and (2) the Data Dictionary for Citizenship Status Codes "A" and "S". Therefore, some clean-up is needed to make these all the same.

The following edit should be established in connection with these requirements:

- If the Visa Type Code (EDB0110) is E3 the Country of Residency (EDB0143) value must be AS. If this is not the case, the text of the error messages (08-099 and 12-099) to be displayed is *Country of Residency must be "AS" for Visa Type Code E3*.
- In the online, this error message should be issued in USER08 and USER12 as an Employee Reject.
- In batch, USER08 turnaround transactions should be presented for entering values for EDB 0110 and/or EDB0143. If not corrected, the transaction should be rejected in USER 12.

The on-line help text for Visa Type Code EDB0110 should be modified as below.

- E3 (new) - *Principal visa holder and dependents from Australia*
- E1 (change) – **Change from** *Dependents (spouse & children ) of principal visa holder* **to** *Treaty Trader, spouse and children*

The Code Translation Table (CTT) should be modified to reflect the new Visa Type Code and changed code.

- E3 (new) - *Principal visa holder and dependents from Australia*
- E1 (change) – **Change from** *Dependents (spouse & children ) of principal visa holder* **to** *Treaty Trader, spouse and children*

## Programs

### **PPEC111**

PPEC111 is the program used to perform consistency edits for Visa Type Code and Citizenship Status Code. An edit was added to this program to insure that if the Visa Type Code is the new code E3, the Country of Residency is "AS", Australia.

### **PPOT1677**

PPOT1677 is a one-time program which will report on all employees with a Citizenship Status Code (EDB0109) of "A" and a Country of Residency (EDB0143) of "JA". It will update the Citizenship Status Code to "N" and will set the Federal Withholding Allowances to 1 if greater than 1. A Spec Card is required and allows for the option to report only or report and update. For either selection, an ECF of change records is produced.

## Copy Member

### **CPWSW88S**

CPWSW 88S is the copy member containing many 88 level definitions used throughout PPS. One of these is a list of allowable Country of Residency Codes for Citizenship Status Code "A" (Non-Resident Alien from Canada, Mexico, Japan and South Korea). This list will be changed to remove "Japan".

## Include Member

### **PPPV400B**

PPPV400B is the include member which is a view of PPPPAY table. One of the items on this view is a list of allowable Country of Residency Codes for Citizenship Status Code "A" (Non-Resident Alien from Canada, Mexico, Japan and South Korea). This list will be changed to remove "Japan".

## Table Updates

### **CICS HELP**

The HELPDDE file contains updated help text for the following EDB data elements.

- EDB0109 – Citizenship Status Code - Removes Japan from Citizenship Status Code A, Non-Resident Alien
- EDB0110 – Visa Type Code - Adds Visa Type Code E3, Principal Visa Holder and Dependents from Australia, changes to description for E1.

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- Clean-up Help Text to make it consistent with the Code Translation Table and the Data Dictionary

### **Code Translation Table**

The following Code Translation Table changes were made.

- A code translation was added for the new Visa Type Code E3, Principal visa holder and dependents from Australia.
- The code translation for Citizenship Status Code "A" was changed to exclude Japan.
- Clean-up Code Translation Table to be consistent with the Help Text and the Data Dictionary

### **System Messages Table**

The following changes were made to the System Messages Table.

- A new error message was added for the new Visa Type Code E3. *COUNTRY OF RESIDENCY MUST BE "AS" FOR VISA TYPE CODE E3*. For the 08 process (08-099), this message has a reject severity in the online but is a warning in batch. For the 12 process (12-099), the message has a reject severity for both the on-line and the batch.
- The error messages (08-459 and 12-238) for Citizenship Status Code "A" were changed to drop "JA" (Japan) from the list of countries associated with "A". Severity was changed from *Informational* to *Employee Reject*.
- The error messages (08-499 and 12-499) for Citizenship Status Code "N" were changed to drop "JA" (Japan) from the list of countries not valid for code "N".

### **Installation Instructions**

A separate set of Installation Instructions has been issued with this release.

### **Test Plan**

A complete test plan has been issued with this release. Campuses are encouraged to use the base system test materials; as well as performing any other desired local tests.

### **Timing of Installation**

The timing of this release is date mandated. It must be installed and the one-time update performed **after** all pay cycles with a December check date and **before** the first pay cycle with a January 2006 check date.

If there are any questions, please send electronic mail to [Janet.Kennedy@ucop.edu](mailto:Janet.Kennedy@ucop.edu), or call (510) 587-6128.

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