

**Detail Design
RELEASE 1702
AFT Dues Filter**

Service Request 81441

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Application Technology Services
Information Resources & Computing
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Introduction

Service Requests 81441

Background:

- In November 2005, The AFT (American Federation of Teachers) notified the University of their desire to change the cap for represented dues for both IX and LX members. They requested that the cap for unrepresented dues for both units remain unchanged.
- In addition, the union requested that employees with dual appointments and both in-unit and non-unit earnings only be assessed represented dues on the unit earnings.
- In subsequent communications with UC-AFT, Labor Relations confirmed that programming changes requested for the IX unit should apply to the LX unit as well.
- Additionally, while researching the current processing of AFT dues, it was discovered that the IX and LX units shared the same Unit Link Indicator as the UPTE bargaining units. The Unit Link Indicator should only be shared by bargaining units represented by a single union, where the union wishes to apply a common cap across its represented units.

Current Process:

- Currently, if an employee is enrolled in represented IX dues (that is, has GTN 163 established on the EDB with a non-zero G balance), and IX earnings are present on the PAR, represented dues are assessed on the IX in-unit earnings. If an employee is enrolled in unrepresented IX dues (GTN 075) and non-unit earnings are present on the PAR, unrepresented dues are taken on all earnings. The same process also applies to represented dues (GTN 378) and unrepresented dues (GTN 075) for the LX unit.
- If an employee is enrolled in both represented and unrepresented dues and both unit and non-unit earnings are present on the PAR, dues are assessed in the following manner:
 - represented dues are taken on the unit earnings
 - unrepresented dues are taken on all earnings
- The end result of this process is that dues are assessed twice on the in-unit portion of the employee's earnings.
- In addition, the AFT and UPTE units are currently "linked" via a shared value in the Unit Link Indicator field on the Bargaining Unit Table. As a result of this shared Unit Link Indicator, a common cap is currently being applied across both AFT and UPTE bargaining units.

Proposed Process:

- During the compute, for the purposes of the dues calculation and assessment only, if an employee is enrolled in at least one form of IX dues (represented or unrepresented) and not also enrolled in Agency Fee or one of the designated charity deductions, the system will treat this employee as if he or she had both the represented and unrepresented dues GTNs present on the EDB. Then, when the process examines the PAR for earnings, dues should be assessed in the following manner:
 - If the PAR contains only IX in-unit earnings, IX represented dues will be assessed on these earnings and the IX represented cap should be applied;
 - If the PAR contains only non-unit earnings, IX unrepresented dues will be assessed on all earnings and the IX non-represented cap should be applied;
 - If the PAR contains a mix of both IX in-unit earnings and non-unit earnings, IX represented dues will be assessed on IX in-unit earnings only and the IX represented cap should be applied. The unrepresented dues should be bypassed entirely.
- The same modification will be made for LX unit dues.
- The new IX and LX represented dues caps will be modified via control table updates.
- In addition, the value of the Unit Link Indicator for the IX and LX units will be modified so that these AFT bargaining units are no longer linked with the UPTE units.

Processing Overview

EDB Maintenance: Dues Movement

No changes will be made to the existing dues movement processes.

Compute Process Changes

PPP400 performs the gross-to-net processing program for a compute cycle. It reads the preliminary PAR, develops deductions and calculates net pay.

It will be modified to analyze an employee's enrollments in IX and LX represented and unrepresented dues and make temporary adjustments to the enrollments so that the deductions can be processed appropriately.

PPS Control Table Updates

Benefits Rates Table

The Benefits Rates Table (BRT) will be updated to reflect the new cap for IX and LX represented dues, agency fee, and charities.

Bargaining Unit Table

The Unit Link Indicator for LX and IX will be modified so that it is a unique value shared only by the IX and LX units.

Program Changes

PPP400

PPP400 performs the gross-to-net processing program for a compute cycle. It reads the preliminary PAR, develops deductions and calculates net pay.

It will be modified to analyze an employee's enrollments in IX and LX represented and unrepresented dues and make temporary adjustments to the enrollments so that the deductions can be processed appropriately.

Detailed program changes follow.

1. During program initialization, an internal array will be loaded with all of the relevant GTN numbers for each LX and IX TUC which has both a represented and unrepresented dues GTN number. For each of these TUCs, the GTNs for represented dues, unrepresented dues, Agency Fee, and the three charities will be recorded in the array.

If the represented or unrepresented dues GTN is not BRT-based (ie. the GTN usage is not B or R or T), the program will abend and issue the following new message:

40-183 UNITS WITH 2 DUES GTNS (REP AND UNREP) MUST BE BRT BASED.

2. Prior to gross-to-net processing for an employee, the same internal array will be populated with the employee's GTN enrollments for all of the relevant GTNs.
3. Still prior to gross-to-net processing, the program will loop through the employee's earnings. If the employee has any earnings for a TUC for which the employee is enrolled in either represented or unrepresented dues, then the following temporary adjustments are made to the employee's enrollments for the duration of gross-to-net processing. Note that the employee may fall into more than one of these cases and the appropriate actions will be taken for each.

Case 1: unit earnings found and enrolled in represented dues GTN

- no action taken

Case 2: unit earnings found and not enrolled in represented dues GTN (and enrolled in unrepresented dues GTN):

- Case 2a: employee is also enrolled in Agency Fee or Charity
 - no action taken
- Case 2b: employee is NOT enrolled in Agency Fee or Charity
 - enroll in represented GTN

Case 3: unit earnings found and enrolled in un-represented dues GTN

- de-enroll from un-represented GTN

Case 4: no unit earnings found and enrolled in represented dues GTN

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- de-enroll from represented GTN

Case 5: no unit earnings found and enrolled in un- represented dues GTN

- no action taken

Case 6: no unit earnings found and not enrolled in un-represented dues GTN (and enrolled in represented dues GTN)

- enroll in un-represented GTN

4. After gross-to-net processing is complete for the employee, the original enrollment values for each GTN will be restored.

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Control Table Updates

System Messages Table (MSG)

The following messages will be added to the System Messages Table:

40-183 – *UNITS WITH 2 DUES GTNS (REP AND UNREP) MUST BE BRT BASED.* with a severity level of '8' (See Operations) for batch

Benefits Rates Table (BRT)

The following changes will be made to the dues caps:

GTN	Unit	Description	New Cap
163	IX	IX Represented Dues	\$65.00
458	IX	IX Agency Fee	\$65.00
500	IX	Spina Bifida Association of America	\$65.00
501	IX	Amnesty International	\$65.00
502	IX	Rosenberg Fund for Children	\$65.00
378	LX	LX Represented Dues	\$65.00
459	LX	LX Agency Fee	\$65.00
503	LX	Spina Bifida Association of America	\$65.00
504	LX	Amnesty International	\$65.00
505	LX	Rosenberg Fund for Children	\$65.00

Bargaining Unit Table (BUT)

The linkage code of "U" will be changed to "A" from the PPPBUF table for the IX and LX entries so that they are no longer linked to UPTE, but are still linked to each other. A is a new linkage code specifically for AFT units.

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Attachments

Attachment A - Control Table Update Transactions - System Messages Table

Attachment B - Control Table Update Transactions - Benefits Rates Table

Attachment C - Control Table Update Transactions - Bargaining Unit Table

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Attachment A - Control Table Update Transactions - System Messages Table

Actual transactions are as follows (double check online and batch severity);

```
-----+-----1-----+-----2-----+-----3-----+-----4-----+-----5-----+-----6-----+-----7-----+-----8  
A08401830115 8 UNITS WITH 2 DUES GTNS (REP AND UNREP) MUST BE BRT BASED.
```

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Attachment B - Control Table Update Transactions - Benefits Rates Table

Actual transactions are as follows;

1	2	3	4	5	6	7	8
C14002163	00065000000065000099999999				00	030106	
C14002458	00065000000065000099999999				00	030106	
C14002500	00065000000065000099999999				00	030106	
C14002501	00065000000065000099999999				00	030106	
C14002502	00065000000065000099999999				00	030106	
C14002378	00065000000065000099999999				00	030106	
C14002459	00065000000065000099999999				00	030106	
C14002503	00065000000065000099999999				00	030106	
C14002504	00065000000065000099999999				00	030106	
C14002505	00065000000065000099999999				00	030106	
C14002163	00065000000065000099999999				IXC	030106	
C14002458	00065000000065000099999999				IXC	030106	
C14002500	00065000000065000099999999				IXC	030106	
C14002501	00065000000065000099999999				IXC	030106	
C14002502	00065000000065000099999999				IXC	030106	
C14002378	00065000000065000099999999				LXC	030106	
C14002459	00065000000065000099999999				LXC	030106	
C14002503	00065000000065000099999999				LXC	030106	
C14002504	00065000000065000099999999				LXC	030106	
C14002505	00065000000065000099999999				LXC	030106	

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Attachment C - Control Table Update Transactions - Bargaining Unit Table

Actual transactions are as follows;

-----+-----1-----+-----2-----+-----3-----+-----4-----+-----5-----+-----6-----+-----7-----+-----8	
C17IXFC	A
C17LXFC	A
C17IXFU	A
C17LXFU	A