

Created on: January 24, 2006
Modified on: February 3, 2006

SR81431 Requirements Step Edit Modifications, Phase II

Objective:

To solve several problems uncovered when the Salary Step edit was modified to query the Title Code Table for valid step values

Project Type:

This is a change to an existing program.

Requested by:

HR&B ISS

Analyst:

Carrie Gatlin

Due Date(s):

This modification is Not Urgent.

Background:

During the RX and TX range-to-step rate conversion (Releases 1580 and 1581), it was necessary to add several additional step values to the existing Salary Step edit in PPS, where the entered value was validated against a list of hard-coded values for academic and staff titles. It was decided that this edit should be modified so that it would validate directly against the Title Code Table (TCT) rather than against the hard-coded lists of values. Release 1636 implemented this change.

Release 1641 subsequently modified the Step edit to allow blank values for all Personnel Program Codes, while Release 1643 addressed additional error reports. Campuses still experiencing high levels of errors from the Step edit were encouraged to downgrade the severity of the edit to 'Warning'.

Proposed Modifications:

1.0 Sequence of Derivations and Edits

Currently the Salary Step edit uses appointment-level data to query TCT for a matching covered or uncovered segment of the Title Code (EDB 2006). The query needs the derived Appointment Representation Code (EDB 2031) to correctly search for a match. If the Appointment Representation Code has not yet been derived at the time the edit is triggered, the edit will return unpredictable results.

It is requested that the Salary Step edit be executed later in the program sequence, after the Appointment Representation Code has been derived.

2.0 Salary Step Edit Triggers

Changes to the following data elements should trigger the execution of the Salary Step edit:

- Title Code (EDB 2006)
- Appointment Department Sub-Location (EDB 2009)
- Appointment Representation Code (EDB 2031)
- Off/Above Scale Indicator (EDB 2050)
- Salary Step (EDB 2049)
- Salary Grade (EDB 2008)
- Distribution of Service Code (EDB 2056)
- Pay End Date (EDB 2054)

3.0 Academic Title Exclusion

Campuses have reported a high number of Salary Step edit rejects among academic appointments. Most of these rejects are due to the following:

- Although Academic titles are step-based on the Title Code Table, most campuses do not enter the Salary Step value on the EDB **distribution**.
- When campuses establish emeritus/without salary appointments for retired professors, they often store the "previous Salary Step" value on the WOS **distribution** line. Because Emeritus/WOS Title Codes do not carry rates in TCT, this causes the step value to be rejected.

To support these established campus practices, the Salary Step edit should not attempt to validate step values for Academic appointments. That is, when the appointment Personnel Program Code (EDB 2007) is equal to 'A' ('Academic'), the edit should be bypassed entirely.

4.0 Error Message

The current text of the Salary Step edit error message is:

08721 STEP INVALID FOR THE PERSONNEL PROGRAM CODE

Because this no longer reflects the edit conditions, the text should be changed to:

STEP INVALID FOR THIS TITLE/SUB-LOC/REP CODE

The severity of the message should be reset to 'Employee Reject' online.

5.0 Invalid Step Value Report

A one-time program should be developed to report invalid step values on the EDB. This report should be sorted by Home Department.

For employees where Employment Status Code (EDB 0144) is not equal to 'S' ('Separated'), the one-time program should select appointments where the Appointment End Date (EDB 2003) is not prior to the current date. For these appointments, the program should examine each current and future distribution to validate the entered step value according to the logic described in this Service Request.

For invalid step values, the program should display the following employee data on the report:

- Employee ID
- Employee Name (EDB 0105)
- Personnel Program Code (EDB 2007)
- Title Code (EDB 2006)
- Appointment Representation Code (EDB 2031)
- Distribution Number (EDB 2041)
- Salary Step (EDB 2049)
- Off/Above Scale Indicator (EDB 2050)
- Distribution Pay Rate (EDB 2055)

The report should be sorted by Employee Name within Department and titled 'Departmental Report of Invalid Step Values'. The Department Number and translated Name should appear in the upper left corner of the report (Attachment A). An electronic version of the report should also be produced.

Attachment A

PPPXXXX/PPPXXX 01/15/97
RETN: SEE RPTS DISP SCHEDULE/DIST.

UNIVERSITY OF CALIFORNIA-SYSTEMWIDE
DEPARTMENTAL REPORT OF INVALID STEP VALUES

PAGE NO. 1
RUN DATE XX/XX/XX

DEPARTMENT: 822501 REPRO GRAPHICS

EMPLOYEE NAME	EMPLOYEE ID	APPT	PGM	TITLE	AREP	DIST	STEP	O/A	RATE
DINNER, BUFFY	000050128	10	1	9610	C	11	4.5		3700.00
EMPLOYEE, TEST12	111111112	20	1	9612	C	25	17.5		3948.00
FRANKLIN, RICHARD M	701000004	10	1	9610	U	13	25.5		32.2400
		20	1	9612	U	23	2.5		16.8600
		30	1	9724	U	34	11.0		20.5500
JOHNSON, MALCOLM P	111111111	10	1	9520	C	15	1.5		3915.00