

Release 1704

**Service Request 81431
Step Edit Modifications, Phase II**

Detail Design

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Introduction

Service Request 81431 – Step Edit Modifications, Phase II

The service request asks that the following change be made to PPS.

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)
- Distribution 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' on-line.

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 step value according to the logic used to validate the step in the batch and on-line.

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. A tab-delimited electronic version of the report should also be produced.

Overview of PPS Modifications

PPS will be modified as follows.

A new program will be developed to perform the Salary Step edit replacing the edit found in PPEC051 (USER08) and PPEI053 (USER12). This new program will also perform the edit of the Off/Above Indicator since it's value is associated with the Salary Step value. As with the Salary Step edit, the Off/Above Indicator edit will be removed from PPEC051 and PPEI053. This new program will execute later in the order of program execution after all data needed has been entered or derived. It will execute only for the USER08 function. This program will process all distributions for all appointments. It will perform the edits only when there is a change to one of the data elements that triggers one or both of the two edits. It will not perform Salary Step edits for appointments with an Academic Personnel Program Code.

- The DET (Data Element Table) will be updated to add triggers for the new Salary Step edit and Off/Above Indicator edit program to the following data elements. This will extend the triggering of this Salary Step edit to certain appointment level data elements. The following data elements will trigger the new edit program. Prior to this release, those elements at the Appointment level did not trigger the step edit.

Appointment

- Title Code (EDB 2006)
- Appointment Department Sub-Location (EDB 2009)
- Appointment Representation Code (EDB 2031)
- Salary Grade (EDB 2008)

Distributions

- Off/Above Scale Indicator (EDB 2050)
- Salary Step (EDB 2049)
- Distribution of Service Code (EDB 2056)
- Pay End Date (EDB 2054)

Note that the DET entry for the Salary Grade does indicate that the step edit will be triggered when the Salary Grade is modified. However, if a Salary Grade and Salary Step are both present, the first error message displayed is 8717 Empl Rej GRADE AND STEP ENTERED - ONLY ONE ALLOWED. The step edit error message will only be seen if the value to the Salary Step is invalid and F6 is used to page through the messages.

Note that a change to the EMP-REL-CODE (EDB0160) may cause the appointment-level Appointment Representation Code (covered/uncovered) to be re-derived, which will cause the step edit to occur.

- The Salary Step edit and Off/Above Indicator edit will be removed from the programs that currently perform these functions, PPEC051 and PPEI053. There will be no Salary Step edit or Off/Above Indicator edit in the USER12 process. The 051 trigger in the Date Element Dictionary (DET) will be removed from the Salary Step and Off/Above data elements.
- The Salary Step edit error message will be changed to a more meaningful message.

A one-time program will be developed to identify distributions that have invalid Salary Step values.

Programs

PPEC051

PPEC051 is the program that performs the minimum distribution consistency edits for the on-line EAPP function (Appointment and Distribution Update), the EAPC function (Appts/Distributions-Condense) and the corresponding batch file maintenance function.

This program will no longer perform the Salary Step edit or the Off/Above Indicator edit. These edits will be moved to the new program, PPEC775.

PPEI053

PPEI053 is the program that performs miscellaneous distribution edits during the update function, on-line and batch.

This program will no longer perform the Salary Step edit or the Off/Above Indicator edit. There will not be a Salary Step edit or Off/Above Indicator edit during the update function, the USER12 process.

PPEC775 - new

PPEC775 is a new program that will perform the Salary Step edit and Off/Above Indicator edit. It will contain the logic removed from PPEC051 and PPEI053. This program will execute at a point in the order of program execution that follows the derivation of the Appointment Representation Code. In addition, the program will be triggered by changes to data elements at the appointment level as well as the distribution level. This program will process all distributions for all appointments. Salary Step edits will *not* be performed for any appointments with an Academic Personnel Program Code. Because there will be no step validation on appointments with Academic titles, the original Off/Above Indicator edits will be modified to exclude the edit that requires a valid step on an Academic title when the Indicator is 'O' and the rank is not 4.

PPOT1704 – one-time

PPOT1704 is a one-time program developed to report invalid step values on the EDB. This report will be sorted by Home Department. For employees where Employment Status Code (EDB 0144) is not equal to 'S' ('Separated'), the one-time program will select appointments where the Appointment End Date (EDB 2003) is not prior to the current date. For these appointments, the program will examine each current and future distribution to validate the step value. This Salary Step edit will *not* be performed for any appointments with an Academic Personnel Program Code.

For invalid step values, the program will print the following employee data on the report:

- Employee ID
- Employee Name (EDB 0105)
- Title Code (EDB 2006)
- Personnel Program Code (EDB 2007)
- 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 will be sorted by Employee Name within Department and titled 'Departmental Report of Invalid Step Values'. The Department Number and translated Name will appear in the upper left corner of the report. A tab-delimited electronic version of the report will also be produced.

Table Updates

RTD table - add the new program PEC775 - Salary Step Edit

PGT table - add trigger definitions for new program PPEC775 - triggers 775(new) and 605 (existing)

DET table - add triggers for 775 to the following data elements

Rep Code (appt)
Sub-location (appt) (the sub-location is derived from the department that is derived from the FAU)
Off/Above Indicator (dist)
DOS Code (dist)
End Date (dist)

Triggers already exist for 605 for the following data elements. Since the number of triggers allowed for the Title Code has reached its maximum, the trigger 605 will be associated with the new program in the PGT table

Title Code (appt)
Grade (appt)
Salary Step (dist)

Remove trigger for 51 from the Salary Step and Off/Above Indicator. PPEI053 executes unconditionally. Therefore, there is no need to update triggers for 53.

MSG table

Change text of the "invalid step" message to the following and reset on-line severity back to Employee Reject.

08721 - STEP INVALID FOR THIS TITLE/SUB-LOC/REP-CODE

Add the following consistency edit

CN775 Empl Rej CONSISTENCY EDIT 775 FAILED