

Service Request #81714

UPTE Dues/Agency Fee/Charities -- Change in Structure/Amount

### Introduction

The University Professional and Technical Employees (UPTE) is the exclusive representative of employees in the Health Care Professionals (HX), Research Support Professionals (RX) and Technical (TX) bargaining units.

UPTE has requested that the University implement changes to its currently established dues, agency fee, and charity deduction amount and deduction structure effective January 1, 2007.

### Background

UPTE deductions are maintained as Benefits Rate Table entries under the following Gross-to-Net numbers:

GTN 370 = "Unrepresented" UPTE dues

GTN 371 = "TX" unit dues

GTN 463 = "TX" unit agency fees

GTN 515, 516, 517 = "TX" unit charities

GTN 375 = "RX" unit dues

GTN 461 = "RX" unit agency fees

GTN 509, 510, 511 = "RX" unit charities

GTN 376 = "HX" unit dues

GTN 457 = "HX" unit agency fees

GTN 497, 498, 499 = "RX" unit charities

UPTE dues/agency fees/charities are currently based on 1.15% of Retirement Gross, with a monthly cap of \$25.00 for "covered" UPTE members/non-members earning \$30,000.00 or less and a monthly cap of \$35.00 for those earning more than \$30,000.00.

UPTE "unrepresented" dues are currently based on 1.15% of Retirement Gross, with a monthly cap of \$20.00.

## Modifications

As requested, effective January 1, 2007, UPTE deductions should be modified such that:

- dues/agency fee/charities are based on 1.3% of Retirement Gross and a monthly cap of \$40.00 for “covered” UPTE members and non/members;
- dues for “unrepresented” UPTE members are based on 1.3% of Retirement Gross and a monthly cap of \$22.00.

The need to have a second cap based on salary is no longer required for UPTE.

It is requested that BRT update transactions and any other modifications to the regular compute and Rush Check process to address elimination of the CAP2 amount and CAP GROSS for all unit deductions be made available to campuses so that locations can implement UPTE’s new rate/structure, effective January 1, 2007, i.e.,

- earnings beginning Jan 1 (MO/SM) paid Feb 1, 2007/January 23, 2007 respectively, and
- earnings beginning Jan 14 (BW) paid February 7, 2007.

Attached, as Exhibit 1, are sample Benefit Rates Table entries reflecting the requested changes including removal of CAP2 (fields 28-36) and CAP GROSS (fields 37-45) from the BRT Table (UPAY712) form. Also attached, as Exhibit 2, is a sample PPP0414 BRT report indicating the CAP2 and CAP GROSS fields to be removed along with a mockup which displays a sample of the resulting report following the change.

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Payroll Coordination

October 25, 2006 (revised 10/26/2006; 11/01/06)



BENEFITS RATES TABLE  
GROSS-TO-NET RATES/AMOUNTS  
FORMAT 001 & 002 & 003  
UPAY712 (R04/04) R1561

A/D	1	2	3	4	6	GTN NO	10	18
	14	001					*	*
	14	001					*	*
	14	001					*	*
	14	001					*	*

BUC	REP	SHC	DUCC	EFFECTIVE DATE
61	62	63	64	65
				66
				71

A percentage should be entered with the integers prior to the implied decimal; for example, 15% should be entered as 00015.0000.

A/D	1	2	3	4	6	7	9	10	18	19	27	28	36	37	45
C	14	002	370	00001.3000	00028.0000										
C	14	002	371	00001.3000	00040.0000										
C	14	002	463	00001.3000	00040.0000										
C	14	002	515	00001.3000	00040.0000										

BUC	REP	SHC	DUCC	EFFECTIVE DATE
61	62	63	64	65
				66
				71
				01/01/07
				01/01/07
				01/01/07
				01/01/07

A/D	1	2	3	4	6	7	9	10	18	19	27	28	36	37	45	46	54
	14	003							*	*	*	*	*	*	*	*	*
	14	003							*	*	*	*	*	*	*	*	*
	14	003							*	*	*	*	*	*	*	*	*
	14	003							*	*	*	*	*	*	*	*	*

BUC	REP	SHC	DUCC	EFFECTIVE DATE
61	62	63	64	65
				66
				71

PREPARED BY:	DATE:	APPROVED BY:	DATE:
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RETENTION: ACCOUNTING: UNTIL ACTION TAKEN

Exhibit-1  
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Att/SR 81714



**BENEFITS RATES TABLE  
GROSS-TO-NET RATES/AMOUNTS  
FORMAT 001 & 002 & 003  
UPAY712 (R04/04) R1561**

A/D	1	2	3	4	6	GTN NO	RATE / AMOUNT
							10, ., *, , 18
		14		001			*
		14		001			*
		14		001			*
		14		001			*

A percentage should be entered with the integers prior to the implied decimal; for example, 15% should be entered as 00015.0000.

BUC	RE	S	D	EFFECTIVE DATE	
61	62	63	64	65	MM DD YY
					66 71

A/D	1	2	3	4	6	7	9	RATE / AMOUNT	CAP	CAP2	CAP GROSS
								10, ., *, , 18	19, ., *, , 27	28, ., *, , 36	37, ., *, , 45
C		14		002		516		00001.3000	00040.0000		
C		14		002		517		00001.3000	00040.0000		
C		14		002		375		00001.3000	00040.0000		
C		14		002		461		00001.3000	00040.0000		

BUC	RE	S	D	EFFECTIVE DATE	
61	62	63	64	65	MM DD YY
					66 71
					01/01/07
					01/01/07
					01/01/07
					01/01/07

A/D	1	2	3	4	6	7	9	RATE / AMOUNT	CAP	DEDUCTION PERCENT	REDUCED DEDUCTION AMOUNT	THRESHOLD PERCENT
								10, ., *, , 18	19, ., *, , 27	28, ., *, , 36	37, ., *, , 45	46, ., *, , 54
		14		003								
		14		003				*	*	*	*	*
		14		003				*	*	*	*	*
		14		003				*	*	*	*	*
		14		003				*	*	*	*	*

BUC	RE	S	D	EFFECTIVE DATE	
61	62	63	64	65	MM DD YY
					66 71

PREPARED BY:	DATE:	APPROVED BY:	DATE:
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RETENTION: ACCOUNTING: UNTIL ACTION TAKEN

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**BENEFITS RATES TABLE  
GROSS-TO-NET RATES/AMOUNTS  
FORMAT 001 & 002 & 003  
UPAY712 (R04/04) R1561**

*Att/SR 81714*

A/D	FORMAT	GTN NO	RATE / AMOUNT
1 2 3 4 6	7 8 9	10 11 12 13 14 15 16 17 18	
	14 001		*
	14 001		*
	14 001		*
	14 001		*

BUC	REP	SCH	DU	EFFECTIVE DATE
61 62	63 64	65	66	MM DD YY 71

A percentage should be entered with the integers prior to the implied decimal; for example, 15% should be entered as 00015.0000.

A/D	FORMAT	GTN NO	RATE / AMOUNT	CAP	CAP2	CAP GROSS
1 2 3 4 6	7 8 9	10 11 12 13 14 15 16 17 18	19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45			
C	14 002	509	00001.3000	00040.0000		
C	14 002	510	00001.3000	00040.0000		
C	14 002	511	00001.3000	00040.0000		
C	14 002	376	00001.3000	00040.0000		

BUC	REP	SCH	DU	EFFECTIVE DATE
61 62	63 64	65	66	MM DD YY 71
				01/01/07
				01/01/07
				01/01/07
				01/01/07

A/D	FORMAT	GTN NO	RATE / AMOUNT	CAP	DEDUCTION PERCENT	REDUCED DEDUCTION AMOUNT	THRESHOLD PERCENT
1 2 3 4 6	7 8 9	10 11 12 13 14 15 16 17 18	19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54				
	14 003						
	14 003						
	14 003						
	14 003						

BUC	REP	SCH	DU	EFFECTIVE DATE
61 62	63 64	65	66	MM DD YY 71

PREPARED BY:	DATE:	APPROVED BY:	DATE:
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RETENTION: ACCOUNTING: UNTIL ACTION TAKEN

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**BENEFITS RATES TABLE  
GROSS-TO-NET RATES/AMOUNTS  
FORMAT 001 & 002 & 003  
UPAY712 (R04/04) R1561**

*Att / SR 81714*

A/D	1	2	3	4	6	GTN NO	RATE / AMOUNT	10	*	18
				14	001				*	
				14	001				*	
				14	001				*	
				14	001				*	

BUC	RE	S	D	EFFECTIVE DATE
61 62	P	H	U	
	63	C	C	66
		64	65	71

A percentage should be entered with the integers prior to the implied decimal; for example, 15% should be entered as 00015.0000.

A/D	1	2	3	4	6	7	9	10	*	18	19	*	27	28	*	36	37	*	45
C				14	002	457		00001.3000					00040.0000						
C				14	002	497		00001.3000					00040.0000						
C				14	002	498		00001.3000					00040.0000						
C				14	002	499		00001.3000					00040.0000						

BUC	RE	S	D	EFFECTIVE DATE
61 62	P	H	U	
	63	C	C	66
		64	65	71
00				01/01/07
00				01/01/07
00				01/01/07
00				01/01/07

A/D	1	2	3	4	6	7	9	10	*	18	19	*	27	28	*	36	37	*	45	46	*	54
				14	003				*			*			*			*			*	
				14	003				*			*			*			*			*	
				14	003				*			*			*			*			*	
				14	003				*			*			*			*			*	

BUC	RE	S	D	EFFECTIVE DATE
61 62	P	H	U	
	63	C	C	66
		64	65	71

PREPARED BY:	DATE:	APPROVED BY:	DATE:
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RETENTION: ACCOUNTING: UNTIL ACTION TAKEN

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**BENEFITS RATES TABLE  
GROSS-TO-NET RATES/AMOUNTS  
FORMAT 001 & 002 & 003  
UPAY712 (R04/04) R1561**

*Att/SR 81714*

A/D	1	2	3	4	6	GTN NO	RATE / AMOUNT
				14	001		*
				14	001		*
				14	001		*
				14	001		*

BUC	R	S	D	EFFECTIVE DATE
61 62	P	C	C	66 71
	63	64	65	

A percentage should be entered with the integers prior to the implied decimal; for example, 15% should be entered as 00015.0000.

A/D	1	2	3	4	6	7	9	10	18	19	27	28	36	37	45
C				14	002	371		00001.3000			00040.0000				
C				14	002	463		00001.3000			00040.0000				
C				14	002	515		00001.3000			00040.0000				
C				14	002	516		00001.3000			00040.0000				

BUC	R	S	D	EFFECTIVE DATE
61 62	P	C	C	66 71
	63	64	65	
TX	C			01/01/07
TX	C			01/01/07
TX	C			01/01/07
TX	C			01/01/07

A/D	1	2	3	4	6	7	9	10	18	19	27	28	36	37	45	46	54
				14	003				*		*	*	*	*	*	*	*
				14	003				*		*	*	*	*	*	*	*
				14	003				*		*	*	*	*	*	*	*
				14	003				*		*	*	*	*	*	*	*

BUC	R	S	D	EFFECTIVE DATE
61 62	P	C	C	66 71
	63	64	65	

PREPARED BY:	DATE:	APPROVED BY:	DATE:
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RETENTION: ACCOUNTING: UNTIL ACTION TAKEN

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**BENEFITS RATES TABLE  
GROSS-TO-NET RATES/AMOUNTS  
FORMAT 001 & 002 & 003  
UPAY712 (R04/04) R1561**

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A/D	1	2	3	4	6	GTN NO	RATE / AMOUNT	10	18
		14		001			*		
		14		001			*		
		14		001			*		
		14		001			*		

BUC	RE	SH	DU	EFFECTIVE DATE
61 62	P	C	C	MM
	63	64	65	YY
				66 71

A percentage should be entered with the integers prior to the implied decimal; for example, 15% should be entered as 00015.0000.

A/D	1	2	3	4	6	7	9	RATE / AMOUNT	CAP	CAP2	CAP GROSS
								10	18	19	27
								28	36	37	45
C		14		002		517		00001.3000	00040.0000		
C		14		002		375		00001.3000	00040.0000		
C		14		002		461		00001.3000	00040.0000		
C		14		002		509		00001.3000	00040.0000		

BUC	RE	SH	DU	EFFECTIVE DATE
61 62	P	C	C	MM
	63	64	65	YY
				66 71
TXC				01/01/07
RXC				01/01/07
RXC				01/01/07
RXC				01/01/07

A/D	1	2	3	4	6	7	9	RATE / AMOUNT	CAP	DEDUCTION PERCENT	REDUCED DEDUCTION AMOUNT	THRESHOLD PERCENT
								10	18	19	27	36
								28	36	37	45	46
								54				
		14		003				*		*	*	*
		14		003				*		*	*	*
		14		003				*		*	*	*
		14		003				*		*	*	*

BUC	RE	SH	DU	EFFECTIVE DATE
61 62	P	C	C	MM
	63	64	65	YY
				66 71

PREPARED BY:	DATE:	APPROVED BY:	DATE:
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RETENTION: ACCOUNTING: UNTIL ACTION TAKEN

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AA/SR 81714

**BENEFITS RATES TABLE  
GROSS-TO-NET RATES/AMOUNTS  
FORMAT 001 & 002 & 003  
UPAY712 (R04/04) R1561**

A/D	1	2	3	4	6	GTN NO	RATE / AMOUNT	10	*	18
		14		001					*	
		14		001					*	
		14		001					*	
		14		001					*	

BUC	R	S	D	EFFECTIVE DATE	
61 62	P	H	U	66	71
	63	64	65		

A percentage should be entered with the integers prior to the implied decimal; for example, 15% should be entered as 00015.0000.

A/D	1	2	3	4	6	7	9	10	*	18	19	*	27	28	*	36	37	*	45
C		14		002		510		00001.3000		00040.0000									
C		14		002		511		00001.3000		00040.0000									
C		14		002		376		00001.3000		00040.0000									
C		14		002		457		00001.3000		00040.0000									

BUC	R	S	D	EFFECTIVE DATE	
61 62	P	H	U	66	71
	63	64	65		
RXC				01/01/07	
RXC				01/01/07	
HXC				01/01/07	
HXC				01/01/07	

A/D	1	2	3	4	6	7	9	10	*	18	19	*	27	28	*	36	37	*	45	46	*	54
		14		003					*		*	*	*	*	*	*	*	*	*	*	*	*
		14		003					*		*	*	*	*	*	*	*	*	*	*	*	*
		14		003					*		*	*	*	*	*	*	*	*	*	*	*	*
		14		003					*		*	*	*	*	*	*	*	*	*	*	*	*

BUC	R	S	D	EFFECTIVE DATE	
61 62	P	H	U	66	71
	63	64	65		

PREPARED BY:	DATE:	APPROVED BY:	DATE:
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RETENTION: ACCOUNTING: UNTIL ACTION TAKEN

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**BENEFITS RATES TABLE  
GROSS-TO-NET RATES/AMOUNTS  
FORMAT 001 & 002 & 003  
UPAY712 (R04/04) R1561**

A/D	1	2	3	4	6	GTN NO	RATE / AMOUNT	10	*	18
				14	001				*	
				14	001				*	
				14	001				*	
				14	001				*	

BUC	R	S	D	EFFECTIVE DATE		
61	62	63	64	65	66	71

A percentage should be entered with the integers prior to the implied decimal; for example, 15% should be entered as 00015.0000.

A/D	1	2	3	4	6	7	9	10	*	18	19	*	27	28	*	36	37	*	45
C				14	002	497		00001.3000					00040.0000						
C				14	002	498		00001.3000					00040.0000						
C				14	002	499		00001.3000					00040.0000						
				14	002														

BUC	R	S	D	EFFECTIVE DATE		
61	62	63	64	65	66	71
					01/01/07	
					01/01/07	
					01/01/07	

A/D	1	2	3	4	6	7	9	10	*	18	19	*	27	28	*	36	37	*	45	46	*	54
				14	003				*			*			*			*			*	
				14	003				*			*			*			*			*	
				14	003				*			*			*			*			*	
				14	003				*			*			*			*			*	

BUC	R	S	D	EFFECTIVE DATE		
61	62	63	64	65	66	71

PREPARED BY:	DATE:	APPROVED BY:	DATE:
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RETENTION: ACCOUNTING: UNTIL ACTION TAKEN

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UNIVERSITY OF CALIFORNIA-SYSTEMWIDE  
 Control File Maintenance  
 Benefits Rates Table

*ATTACHMENT / SR 81714*

EARNINGS EFFECTIVE DATE: 00/00/00 BARG UNIT: 00 REP: SPCL HNDLG: DIST UNIT:

GROSS-TO-NET

GROSS-TO-NET NUMBER	RATE/AMOUNT	CAP	<del>CAP2</del>	<del>CAP GROSS</del>	THRESHOLD PERCENTAGE	REDUCED DED AMOUNT	DEDUCTION PERCENTAGE
073	1.5000	50.0000	50.0000	99999.9999			
075	.9960	55.0000	55.0000	9999.9999			
077	2.2000	89.5200			.3000	44.7600	1.0000
088	20.0000						
163	1.3500	65.0000	65.0000	99999.9999			
370	1.1500	20.0000					
371	1.1500	25.0000	35.0000	30000.0000			
374	.5000	99999.9999	99999.9999	99999.9999			
375	1.1500	25.0000	35.0000	30000.0000			
376	1.1500	25.0000	35.0000	30000.0000			
377	1.1500	99999.9999	99999.9999	99999.9999			
378	1.3500	65.0000	65.0000	99999.9999			
455	.4750	99999.9999	99999.9999	99999.9999			
456	1.5000	50.0000	50.0000	99999.9999			
457	1.1500	25.0000	35.0000	30000.0000			
458	1.3500	65.0000	65.0000	99999.9999			
459	1.3500	65.0000	65.0000	99999.9999			
460	2.2000	89.5200			.3000	44.7600	.9237
461	1.1500	25.0000	35.0000	30000.0000			
462	1.5000	50.0000	50.0000	99999.9999			
463	1.1500	25.0000	35.0000	30000.0000			
474	.9200	99999.9999	99999.9999	99999.9999			
486	1.5000	50.0000	50.0000	99999.9999			

*Exhibit 2  
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UNIVERSITY OF CALIFORNIA-SYSTEMWIDE  
Control File Maintenance  
Benefits Rates Table

EARNINGS EFFECTIVE DATE: 00/00/00 BARG UNIT: 00 REP: SPCL HNDLG: DIST UNIT:

GROSS-TO-NET

GROSS-TO-NET NUMBER	RATE/ AMOUNT	CAP	THRESHOLD PERCENTAGE	REDUCED DED AMOUNT	DEDUCTION PERCENTAGE
073	1.5000	50.0000			
075	.9960	55.0000			
077	2.2000	89.5200	.3000	44.7600	1.0000
088	20.0000				
163	1.3500	65.0000			
370	1.3000	22.0000			
371	1.3000	40.0000			
374	.5000	99999.9999			
375	1.3000	40.0000			
376	1.3000	40.0000			
377	1.1500	99999.9999			
378	1.3500	65.0000			
455	.4750	99999.9999			
456	1.5000	50.0000			
457	1.3000	40.0000			
458	1.3500	65.0000			
459	1.3500	65.0000			
460	2.2000	89.5200	.3000	44.7600	.9237
461	1.3000	40.0000			
462	1.5000	50.0000			
463	1.3000	40.0000			
474	.9200	99999.9999			
486	1.5000	50.0000			

*Exh. 2  
page 2 of 2*