

Created on: November 13, 2006
Last Modified on: December 20, 2006
SR_81745_UCRS.doc

SR81745 Requirements

Objectives:

1. Modify UCRP Calculation Process to use EBEUC and EBERC
2. Modify UCRS Employee File Maintenance File and History Files to add EBEUC and EBERC

Project Type:

This is an enhancement to existing programs.

Requested by:

Gary Schlimgen, HR & B – Retirement Policy & Planning

Analyst:

Patricia Mashhoon, HR&B – Information Systems Support

Due Date:

These changes must be released in sufficient time to allow locations to install & test in preparation for the UCRP changes that are expected to be effective with July 2007 earnings.

Background:

Service Request 81573 asked that the UCRP employee deduction calculation logic be reviewed and tested in order to document the processing and interaction of the Basic (Plan 5) Rate, the DCP Rate, and the Regents Reduction. In addition, in order to provide increased flexibility and consistency, it was asked that the rate selection process be made sensitive to collective bargaining criteria, utilizing employee-level EUC and ERC data elements to select the associated Benefits Rates Table retirement rates. These changes to PPS were issued as Release 1715.

Release 1735 modified PPS per Service Request 81540 so that medical benefits would be collective bargaining sensitive. This release provided three new employee-level data elements to support this new functionality: Employee Benefit Eligibility Unit Code (EBEUC), Employee Benefit Eligibility Representation Code (EBERC) and Employee Benefit Eligibility Derivation Indicator. It has been determined that an employee's EBEUC and EBERC values should be used for UCRP retirement calculation purposes as well, replacing the EUC and ERC values that are currently being used for Benefits Rates Table retirement rate selection.

1. Modify UCRP Calculation Process to use EBEUC and EBERC

Current Process:

The BRT rate selection for UCRP employee deductions uses the Employee Unit Code (EDB0255) and the Employee Representation Code (EDB0295) in matching specific UCRP rates per the BRT Bargaining Unit and Representation Code. When Bargaining Unit specific rates are not found, the "default" (Bargaining Unit '00') rates are used in the calculations.

Proposed Process:

The current process will be modified by replacing the EUC and ERC with the EBEUC and EBERC values, respectively, in selecting unit-specific rates from the BRT for performing retirement calculations. When unit-specific rates are not found, the BRT default rates (Bargaining Unit code '00') should be used.

SR81745_UCRS.doc

Page 1 of 6

PPS Processes Impacted:

- **Payroll batch compute:** the gross-to-net logic should be modified to use the Employee Benefit Eligibility Unit Code (EDB0445) and Employee Benefit Eligibility Representation Code (EDB0446) in order to obtain a matching retirement rate set from the Benefits Rates Table for the calculation of UCRS Basic deductions, DCP deductions and the Regents' Reduction for current and late payments. These new data elements should also be used during C-O-H processing in the posting of UCRP activity to the historic balances on the EDB. If no matching rate set is found, the BRT default rates associated with bargaining unit '00' should be used.
- **Online Rush Checks:** modify the logic to replace Employee Unit Code (EDB0255) and Employee Representation Code (EDB0295) with Employee Benefit Eligibility Unit Code (EDB0445) and Employee Benefit Eligibility Representation Code (EDB0446), respectively, in the selection of bargaining-unit specific rates from the BRT for the development of current deduction amounts. When such unit-specific rates are not found, the BRT default rates (Bargaining Unit code '00') should be used.
- **ORCA (overpayment processing via OVPY screen):** replace Employee Unit Code (EDB0255) and Employee Representation Code (EDB0295) with Employee Benefit Eligibility Unit Code (EDB0445) and Employee Benefit Eligibility Representation Code (EDB0446), respectively, in the selection of a BRT retirement rate set. If there is no retirement rate set associated with the EBEUC and EBERC, then the default (Unit Code "00") BRT rate set will be used.

2. Modify UCRS Interface Process for EBEUC and EBERC

Proposed Changes:

Modify the UCRS Interface File produced as part of the month-end PPS process to include the EBEUC and EBERC codes, as follows:

UCRS PPI740 Payroll File Maintenance File

The Employee Benefit Eligibility Unit Code (EDB0445) and Employee Benefit Eligibility Representation Code (EDB0446) should be added to this record in positions 432-433 and 434, respectively. Positions 435-436 will remain as filler. See Attachment A for the proposed file layout.

UCRS PPI740 Payroll History File

The Employee Benefit Eligibility Unit Code (EDB0445) and Employee Benefit Eligibility Representation Code (EDB0446) should be added to this record in positions 441-442 and 443, respectively. Positions 444-445 will remain as filler. See Attachment B for the proposed file layout.

ATTACHMENT A

UCRS Payroll File Maintenance Record Layout (PPI740)				
SR81745				
Position	Length/Format	Field Description	Data Element #	Comments
1	1	Record Code		Value '2'
2 – 10	9	Social Security Number	EDB0111	
11 – 12	2	Location		A unique code assigned to each campus, lab, Hastings and ASUCLA
13 – 18	6 yymmdd	Transaction Date		Run Date
19 – 20	2	Transaction Type		Value '10' for add Value '11' for change
21 – 46	26	Employee Name	EDB0105	
47 – 50	4	Employee Name Suffix	EDB0106	
51 – 59	9	Employee ID		
60	1	Retirement System Code	EDB0122	
61 – 66	6 yymmdd	Employee Birth Date	EDB0107	
67	1	Employee Sex Code	EDB0108	
68 – 73	6 yymmdd	Most Recent Hire Date	EDB0113	
74 – 79	6 yymmdd	UCRS Eligibility Date	EDB0163	
80 – 109	30	Address Permanent Line One	EDB0204	
110-139	30	Address Permanent Line Two	EDB0205	
140-160	21	Address Permanent City	EDB0206	
161	1	Foreign Address Indicator	EDB0291	
162-163	2	Address Permanent State	EDB0207	
164-168	5	Address Permanent ZIP	EDB0208	
169-172	4	Filler		NOTE: This field is associated with Zip Code and should not be used
173-187	15	Foreign Address – Province	EDB1120	
188-197	10	Foreign Address – Postal Code	EDB1119	
198-227	30	Foreign Address – Country	EDB1118	Translated from FCT
228-233	6 yymmdd	Leave of Absence Begin Date	EDB0137	
234-230	6 yymmdd	Leave of Absence Return Date	EDB0138	
240-245	6 yymmdd	Separation Date	EDB0140	
246-254	9	Previous SSN		

UCRS Payroll File Maintenance Record Layout (PPI740)

SR81745

Position	Length/ Format	Field Description	Data Element #	Comments
255-280	26	Previous Name		
281-284	4	Previous Suffix		
285	1	Employee Relations Code	EDB0160	
286-287	2	Employee Unit Code	EDB0255	
288	1	Employee Special Handling Code	EDB0256	
289	1	Employee Distribution Unit Code	EDB0257	
290	1	Employee Representation Code	EDB0295	
291	1	Location Indicator		From PPS Home Dept Table
292	1	Assigned BELI	EDB0360	
293	1	Employee Without Salary Indicator	EDB0778	
294-299	6	Distribution Eligibility Date	EDB0777	
300	1	Filler		Value is spaces
301	1	UCRP Covered Compensation Limit Code	EDB0236	
302	1	UC Student Status Code	EDB0119	
303-305	3 99V9	Number of Registered UC Student Units	EDB0237	
306-311	6 yymmdd	403(b) MAC Change Date	EDB0279	
312-318	7 S9(5)99	403(b) MAC Amount	EDB6008 U	
319-320	2	Separation Reason Code	EDB0141	
321-350	30	Employee First Name	EDB0250	
351-380	30	Employee Middle Name	EDB0251	
381-410	30	Employee Last Name	EDB0252	
411-412	2	START Reduction Percentage	EDB0495	
413-418	6 yymmdd	START Begin Date	EDB0496	
419-424	6 yymmdd	START End Date	EDB0497	
425-431	7 S9(5)99	457(b) MAC Amount	EDB6398 U	
432-433	2	Employee Benefit Eligibility Unit Code	EDB0445	New Data Element
434	1	Employee Benefit Eligibility Representation Code	EDB0446	New Data Element
435-436	2	Filler		Value is spaces

ATTACHMENT B

UCRS Payroll History Record Layout (PPI740)				
SR81745				
Position	Length/ Format	Field Description	Data Element #	Comments
1 – 9	9	History Key		Employee ID
10	1	Record Code		Value '2'
11 – 19	9	Social Security Number	EDB0111	
20 – 21	2	Location		A unique code assigned to each campus, lab, Hastings, and ASUCLA.
22 – 27	6 yymmdd	Transaction Date		Run Date
28 – 29	2	Transaction Type		Value '11'
30 – 55	26	Employee Name	EDB0105	
56 – 59	4	Employee Name Suffix	EDB0106	
60 – 68	9	Employee ID		
69	1	Retirement System Code	EDB0122	
70 – 75	6 yymmdd	Employee Birth Date	EDB0107	
76	1	Employee Sex Code	EDB0108	
77 – 82	6 yymmdd	Most Recent Hire Date	EDB0113	
83 – 88	6 yymmdd	UCRS Eligibility Date	EDB0163	
89 – 118	30	Address Permanent Line One	EDB0204	
119-148	30	Address Permanent Line Two	EDB0205	
149-169	21	Address Permanent City	EDB0206	
170	1	Foreign Address Indicator	EDB0291	
171-172	2	Address Permanent State	EDB0207	
173-177	5	Address Permanent ZIP	EDB0208	
178-181	4	Filler		NOTE: This field is associated with Zip Code and should not be used
182-196	15	Foreign Address – Province	EDB1120	
197-206	10	Foreign Address – Postal Code	EDB1119	
207-236	30	Foreign Address – Country	EDB1118	
237-242	6	Leave of Absence Begin Date	EDB0137	
243-248	6 yymmdd	Leave of Absence Return Date	EDB0138	
249-254	6 yymmdd	Separation Date	EDB0140	
255-263	9	Previous SSN		

UCRS Payroll History Record Layout (PPI740)

SR81745

Position	Length/ Format	Field Description	Data Element #	Comments
264-289	26	Previous Name		
290-293	4	Previous Suffix		
294	1	Employee Relations Code	EDB0160	
295-296	2	Employee Unit Code	EDB0255	
297	1	Employee Special Handling Code	EDB0256	
298	1	Employee Distribution Unit Code	EDB0257	
299	1	Employee Representation Code	EDB0295	
300	1	Location Indicator		From Home Dept Table
301	1	Assigned BELI	EDB0360	
302	1	Employee Without Salary Indicator		
303-308	6 yymmdd	Distribution Eligibility Date		
309	1	Filler		Value is spaces
310	1	UCRP Covered Compensation Limit Code	EDB0236	
311	1	UC Student Status Code	EDB0119	
312-314	3 99v9	Number of Registered UC Student Units	EDB0237	
315-320	6 yymmdd	403(b) MAC Change Date	EDB0279	
321-327	7 S905)v99	403(b) MAC Amount (MAC)	EDB6008U	
328-329	2	Separation Reason Code	EDB0141	
330-359	30	Employee First Name	EDB0250	
360-389	30	Employee Middle Name	EDB0251	
390-419	30	Employee Last Name	EDB0252	
420-421	2	START Reduction Percentage	EDB0495	
422-427	6 yymmdd	START Begin Date	EDB0496	
428-433	6 yymmdd	START End Date	EDB0497	
434-440	7 S9(05)v99	457(b) MAC Amount (MAC)	EDB6398U	
441-442	2	Employee Benefit Eligibility Unit Code	EDB0445	New Data Element
443	1	Employee Benefit Eligibility Representation Code	EDB0446	New Data Element
444-445	2	Filler		Value is spaces