

Service Request 81863
Duplicate Insurance Coverage Report and
Executive Life Imputed Income Report
June 25, 2007
July 25, 2007

Objective:

Modify PPS reports to add a new sort option to the Duplicate Insurance Coverage Reports and the Executive Life Imputed Income Report. Additionally, the Duplicate Insurance Coverage Reports should be modified to include the Most Recent Hire Date and to remove the Social Security Number.

Project Type:

PPS modification

Requested By:

Payroll Coordination and Tax Services

Analyst:

Julia Sills

Due Date:

Not urgent

Service Request 81863
Duplicate Insurance Coverage Report and
Executive Life Imputed Income Report
June 25, 2007
July 25, 2007

Background

The Los Angeles campus has requested that a new sort option be added to the Duplicate Insurance Coverage Reports and the Executive Life Imputed Income Report so that they will have the capability of sorting the reports by the Department Location Indicator value as well as the present option. Additionally, it is requested that the Duplicate Insurance Coverage Reports be modified to include the Most Recent Hire Date and that the Social Security number be removed from these reports.

Current Process

Currently, there are two options for the Duplicate Insurance Coverage reports. Option 1 produces the report for employees and option 2 produces the report for dependents. The Executive Life Imputed Income Report currently has no sort options.

Requested Changes

PPP8821 – Duplicate Insurance Coverage Reports Employee
PPP8822 – Duplicate Insurance Coverage Reports Dependent

- The PPP8821 and PPP8822 reports should be modified to include the Most Recent Hire Date (DE 0113).
- In order to protect the privacy of employees and their dependents modifications should be made to remove the Social Security Number (EDB 0111) from the PPP8821 and the dependent's Social Security Number (EDB 0636) from the PPP8822 report.
- The current field on report PPP8821 that displays the Social Security Number should be replaced with the Most Recent Hire Date. Attachment 1 contains a copy of the report before and after the suggested changes.
- After the current field on report PPP8822 that displays the dependent's Social Security Number is removed and the Most Recent Hire Date is added the report needs to be realigned so it will not be unbalanced. Attachment 2 contains a copy of the report before and after the suggested changes.

Service Request 81863
Duplicate Insurance Coverage Report and
Executive Life Imputed Income Report
June 25, 2007
July 25, 2007

- Modifications should be made to the existing run specification sort options for the PPP8821/PPP882 and PPP8822/PPP882 reports. The new option will allow campuses to sort the data by the 1 (one) character Department Location Indicator value on the Home Department (EDB 0114) Table when the new sort option is selected.

The Department Location Indicator should be added to the data used for reporting on the following reports:

PPP8821 Duplicate Insurance Coverage Report – Employee
PPP8822 Duplicate Insurance Coverage Report – Dependent

Please note that the Department Location Indicator should only be displayed on the reports when the new sort option is selected.

If the new sort option is chosen the reports should be sorted as follows:

PPP8821

The PPP8821 report should be sorted by Department Location Indicator then by Employee Name and then Covered Employee Name.

PPP8822

The PPP8822 report should be sorted by the Department Location Indicator then by the dependent's Social Security Number and then by Employee Identification Number.

The PPP8821 and PPP8822 reports should page break on each change of the Department Location Indicator with the page number being restarted anew. Please note that the employee's data on each line of the report has not changed.

Attachment 1 and 2 contains marked-up copies of the PPP8821 and PPP8822 reports displaying the addition of the "Most Recent Hire Date", "Department Location Indicator" and the removal of the Social Security Number.

- The PPP8821 and PPP8822 reports should display the Most Recent Hire Date (DE 0113) regardless of the sort option.

PPP6601- Executive Life Imputed Income Report

- Modifications should be made to the PPP6601 Executive Life Imputed Income Report to include the Department Location Indicator.

Service Request 81863
Duplicate Insurance Coverage Report and
Executive Life Imputed Income Report
June 25, 2007
July 25, 2007

This new option will allow campuses to sort the data by the 1 (one) character Department Location Indicator value on the Home Department Table.

- Currently, the PPP6601 report does not have a Program Run Specification form to specify how the report should be sorted. So a new form will be required to allow campuses to specify the sort option for the PPP6601 report.

The Department Location Indicator should only be displayed when the new sort option is selected.

If the new sort option is chosen the report should be sorted by Department Location Indicator then by Employee Identification Number.

The PPP6601 report should page break on each change of the Department Location Indicator with the page number being restarted anew when the new sort option is chosen. Please note that the employee's data on each line of the report has not changed.

Attachment 3 contains a marked-up copy of the PPP6601 displaying the addition of the "Department Location Indicator".

The current values for the Department Location Indicator are as follows:

C - Campus
M - Medical Center
P - Office of the President
A - Div. of Agriculture and Natural Resources
V - Merced
E - Continuing Education of the Bar (CEB)
B - UC Press Books
J - UC Press Journals

Form UPAY 823

The Dependent Enrollments Monthly Reports Program Run Specifications UPAY 823 form should be modified to reflect the new sort option for the PPP8821 and PPP8822 reports. The suggested text for the new sort option is "sort both reports by the Department Location Indicator". Attachment 4 contains a copy of the UPAY 823 form.

Due Date

This is not urgent.

Service Request 81863
 Duplicate Insurance Coverage Report and
 Executive Life Imputed Income Report
 June 25, 2007
 July 25, 2007

Attachment 1

Before applying changes

PPP8821/PPP882		UNIVERSITY OF CALIFORNIA-SYSTEMWIDE		PAGE NO.	0000011
RETN: SEE RPTS DISP SCHEDULE/DIST.		DUPLICATE INSURANCE COVERAGE REPORT - EMPLOYEE		RUN DATE	06/01/07
DATA BASE UPDATE DATE 06/01/07					
EMPLOYEES COVERED AS DEPENDENTS:					

EMPLOYEE NAME	ID NO.	DUPLICATE PLAN COVERAGE				SSN	COVERED AS A DEPENDENT UNDER	
		MED	DEN	OPT	LEG		EMPLOYEE NO.	EMPLOYEE NAME
							AS DEPENDENT NO./NAME	
BELL, YOHANN	890888888	YES	YES	YES	NO	000031585	000007453	BELL, RHO
							01	BELL, JOHN
DIAMOND, JIM	852199999	NO	YES	YES	NO	000007059	000029290	DIAMOND, MOM
							01	DIAMOND, KID
WIN, DAN	841977779	YES	NO	NO	NO	000057052	000088361	WYN, GLEN
							51	TEK, DANI

Service Request 81863
 Duplicate Insurance Coverage Report and
 Executive Life Imputed Income Report
 June 25, 2007
 July 25, 2007

Attachment 1

After applying changes

Department Location Indicator added
 Social Security Number field removed and
 replaced with the Most Recent Hire Date

PPP8821/PPP882 UNIVERSITY OF CALIFORNIA-SYSTEMWIDE PAGE NO. 0000011
 RETN: SEE RPTS DISP SCHEDULE/DIST. DUPLICATE INSURANCE COVERAGE REPORT - EMPLOYEE RUN DATE 06/01/07
 DATA BASE UPDATE DATE 06/01/07
 EMPLOYEES COVERED AS DEPENDENTS:

→Department Location Indicator:

EMPLOYEE NAME	ID NO.	DUPLICATE PLAN COVERAGE				Most Recent Hire Date	COVERED AS A DEPENDENT UNDER		
		MED	DEN	OPT	LEG		EMPLOYEE NO.	EMPLOYEE NAME	AS DEPENDENT NO./NAME
BELL, YOHANN	890888888	YES	YES	YES	NO	01/02/98	000007453	BELL,RHO 01 BELL,JOHN	
DIAMOND, JIM	852189999	NO	YES	YES	NO	02/04/94	000029290	DIAMOND, MOM 01 DIAMOND KID	
WIN,DAN	841977779	YES	NO	NO	NO	12/15/06	000088361	WYN,GLEN 51 TEK,DANI	

Service Request 81863
 Duplicate Insurance Coverage Report and
 Executive Life Imputed Income Report
 June 25, 2007
 July 25, 2007

Attachment 2

Before applying changes

PPP8822/PPP882		UNIVERSITY OF CALIFORNIA-SYSTEMWIDE				PAGE NO.	000001
RETN: SEE RPTS DISP SCHEDULE/DIST.		DUPLICATE INSURANCE COVERAGE REPORT - DEPENDENTS				RUN DATE	05/29/07
DATA BASE UPDATE DATE 05/29/07							
DEPENDENT SSN	DUPLICATE PLAN COVERAGE				EMPLOYEE NO./NAME		
	MED	DEN	OPT	LEG	DEPENDENT NO./NAME		
000000021	NO	YES	YES	NO	000004466 HERN, SHEN 02 HERN, ANNE 000004467 YAN, PING 02 HERN, ANNE		
000000025	YES	YES	YES	NO	000004469 TRAM, FONSO 02 TRAM, NAT 000007316 REVERA, NIA 03 TRAM, NAT		
000000030	NO	YES	NO	NO	000009605 BO, RAM 02 BO, MARIJO 000009631 BO, MARTY 02 BO, MARIJO		
000000035	NO	NO	NO	YES	000031403 BURT, REYNOLDS 02 BURT, C 000035520 BURT, TAMRIN 02 BURT, C		
000000040	NO	YES	NO	NO	000049605 BO, RAM 03 BO, RAM 000049731 BO, MARTY 03 LOBO, B RO		
000000045	NO	NO	NO	YES	000052475 SHEL, ANNE 02 SHEL, ROB J 000057702 SHEL, DAVIS 02 SHEL, ROB J		
000000050	NO	NO	NO	YES	000057777 BURTE, ANIE 04 BURTE, MATTY 000058888 BURTE, TAMRIN 04 BURTE, MATTY		

Service Request 81863
 Duplicate Insurance Coverage Report and
 Executive Life Imputed Income Report
 June 25, 2007
 July 25, 2007

Attachment 2 - After applying changes

Department Location Indicator added
 Social Security Number field removed and
 Most Recent Hire Date added
 Report should be realigned so that it will be balanced

1PPP8822/PPP882 UNIVERSITY OF CALIFORNIA-SYSTEMWIDE PAGE NO. 000001
 RETN: SEE RPTS DISP SCHEDULE/DIST. DUPLICATE INSURANCE COVERAGE REPORT - DEPENDENTS RUN DATE 05/29/07
 DATA BASE UPDATE DATE 05/29/07

→Department Location Indicator:

DUPLICATE PLAN COVERAGE				EMPLOYEE NO./NAME	Most Recent Hire Date
MED	DEN	OPT	LEG	DEPENDENT NO./NAME	
NO	YES	YES	NO	000004466 HERN,SHEN 02 HERN,ANNE	06/07/07
				000077193 YAN,PING 02 HERN,ANNE	06/01/06
YES	YES	YES	NO	000004469 TRAM,FONSO 02 TRAM,NAT	07/01/05
				000007316 REVERA,NIA 03 TRAM,NAT	01/01/00
NO	YES	NO	NO	000009605 BO, RAM 02 BO, MARIJO	01/15/71
				000036331 BO,MARTY 02 BO,MARIJO	12/01/05
NO	NO	NO	YES	000031403 BURT,REYNOLDS 02 BURT, C	06/22/06
				000025520 BURT,TAMRIN 02 BURT, C	02/01/05
NO	YES	NO	NO	000049605 BO, RAM 03 BO, RAM	01/15/71
				000036331 BO,MARTY 03 BO, B RO	02/28/03
NO	NO	NO	YES	000057702 SHEL, ANNE 02 SHEL,ROB J	03/07/95
				000097702 SHELBY, DAVID R. 02 SHEL,DAVIS	09/05/05
NO	NO	NO	YES	000058888 BURTE, ANIE 04 BURTE, MATTY	08/01/98
				000025520 BURTE, TAMRIN 04 BURTE, MATTY	07/01/06

Service Request 81863
 Duplicate Insurance Coverage Report and
 Executive Life Imputed Income Report
 June 25, 2007
 July 25, 2007

Attachment 3 Report before applying changes

PPP6601/PPP660 /110591		UNIVERSITY OF CALIFORNIA-SYSTEMWIDE							PAGE NO.		0001		
RETN: SEE RPTS DISP SCHEDULE/DIST.				PAYROLL PROCESSING					RUN DATE		06/01/07		
EXECUTIVE LIFE IMPUTED INCOME REPORT													
EMPLOYEE ID NUMBER	EMPLOYEE NAME	EMPL STAT	BASE SAL	PART IND	EMP AGE	SEPARATION DATE	LOA BEGN DATE	LOA DATE	RET ELIG	FICA YTD	OASDI GROSS	MEDICARE YTD GROSS	PAY SCHED
993226075	SMITTY, ERNST	A	208	2	65				N	.00		.00	MO
										----- IMPUTED INCOME -----			
										MAY		YTD	
	10 01/09/06 - INDEF		REGULAR		100%					\$528.32		\$3,662.68	
994340387	ALAN, JAMES	A	157	2	61				E	78546.20		78546.20	MO
										----- IMPUTED INCOME -----			
										MAY		YTD	
	10 03/01/00 - INDEF		REGULAR		100%					\$398.78		\$2,745.74	
997155204	CASSIE, JOHN E	A	255	2	55				E	97500.00		131394.54	MO

Service Request 81863
 Duplicate Insurance Coverage Report and
 Executive Life Imputed Income Report
 June 25, 2007
 July 25, 2007

Attachment 3
Report after applying changes

PPP6601/PPP660 /110591		UNIVERSITY OF CALIFORNIA-SYSTEMWIDE						PAGE NO.		0001			
RETN: SEE RPTS DISP SCHEDULE/DIST.				PAYROLL PROCESSING				RUN DATE		06/01/07			
				EXECUTIVE LIFE IMPUTED INCOME REPORT									
→Department Location Indicator:													
EMPLOYEE ID NUMBER	EMPLOYEE NAME	EMPL STAT	BASE SAL	PART IND	EMP AGE	SEPARATION DATE	LOA BEGN DATE	LOA RET DATE	FICA ELIG	OASDI YTD GROSS	MEDICARE YTD GROSS	PAY SCHED	
993226075	SMITTY, ERNST	A	208	2	65				N	.00	.00	MO	
										----- IMPUTED INCOME -----			
										MAY		YTD	
	10 01/09/06 - INDEF		REGULAR		100%				\$528.32		\$3,662.68		
99440387	ALAN, JAMES	A	157	2	61				E	78546.20	78546.20	MO	
										----- IMPUTED INCOME -----			
										MAY		YTD	
	10 03/01/00 - INDEF		REGULAR		100%				\$398.78		\$2,745.74		
997155204	CASSIE, JOHN E	A	255	2	55				E	97500.00	131394.54	MO	

Service Request 81863
 Duplicate Insurance Coverage Report and
 Executive Life Imputed Income Report
 June 25, 2007
 July 25, 2007



PAYROLL/PERSONNEL
DEPENDENT ENROLLMENTS MONTHLY REPORTS
PROGRAM RUN SPECIFICATIONS
 UPAY823 (R5/98) R1187

INSTRUCTIONS:
 Complete individual program run specifications as necessary for desired reporting.

Pending Overage Dependents & Pending De-enrollment Reports				Rpt. Opt.	Rpt. Opt.	Rpt. Opt.	Rpt. Opt.	Label File
				1	2	3	4	
1	11	12	15	16	17	18	19	20
P P P 8 8 0 - S P E C								
				blank - do not create label file				
				Y - create label file				

Rpt. Opt. 1: Pending Overage Dependents (month, employee name, dependent name sequence)
 Rpt. Opt. 2: Pending Overage Dependents (home dept, month, employee name, dependent name sequence)
 Rpt. Opt. 3: Pending De-Enrollment of Dependents (employee name, dependent name sequence)
 Rpt. Opt. 4: Pending De-Enrollment of Dependents (home dept, employee name, dependent name sequence)

blank - no report
 Y - create report

Dependent "Other Child" Verification Report				Label File
				blank - do not create label file
				Y - create label file
1	11	12	17	18
P P P 8 8 1 - S P E C				
				blank - do not create label file
				Y - create label file

Duplicate Insurance Coverage Reports				Rpt. Opt.	Rpt. Opt.
				1	2
1	11	12	15	16	17
P P P 8 8 2 - S P E C					
				Rpt. Opt. 1: Duplicate Insurance Coverage - Employee	
				Rpt. Opt. 2: Duplicate Insurance Coverage - Dependents	
				blank - no report	
				Y - create report	

PREPARED BY:	DATE
APPROVED BY:	DATE