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SR82160_Union File Reporting Mods.doc

SR82160 Requirements
Union File Reporting Modifications

Objective:

Modify the existing Union File Reporting process in PPS to provide full appointment data for represented, non-separated employees who transfer to positions in another bargaining unit

Project Type:

Enhancement to an existing process

Requested by:

Myria Butler – UCOP Labor Relations

Analyst:

Patricia Mashhoon

Due Date(s):

To be completed in time for July 2008 reporting

Background:

With Release 1288, the PPS was modified to provide a single process for reporting employee data to unions. Subsequent PPS changes in Release 1461 refined the process to be run weekly.

This process provides reporting for employees within each of the exclusively-represented units as follows:

- (1) first week of the month: full data, with status codes:
 - U = no change from history (full record written)
 - C = if changed, full record written
 - A = add new record (full data) if hire date is greater than or equal to current date – 60 days; otherwise it is reported as a ‘transfer in’
 - D = partial record written

- (2) subsequent weeks = updates to employees’ EDB data (adds, changes & deletes)
 - partial records are written

CUE has recently filed an unfair labor practice complaint with the University regarding its failure to provide data on employees who have transferred out of the CX unit. Such transfers may be the result of moving from a represented to an unrepresented appointment, or from moving into a position in another bargaining unit.

An employee who leaves the unit may be flagged as a delete, but no new appointment or work location data is supplied; specifically, CUE has requested that additional ‘destination’ information be included for reporting.

Service Request 81853 was written to request that UCOP- IR&C do research and analysis to explore the feasibility of modifying the existing process to provide this additional data. On July 13, 2007, UCOP-IR&C documented the findings in the document entitled “Response to SR81853”.

This service request describes proposed changes to the current process based on the above analysis that will provide additional data on employees who ‘transfer out’ of the unit; note that these modifications will be applicable to **all** unions.

I. Current Process:

When preparing weekly or monthly ‘update’ reporting for a given bargaining unit, records are compared to those in the history file to determine the appropriate action codes that will be associated with the output records. A ‘delete’ activity record is written when the employment status is ‘separated’ or ‘inactive’ or when the employee no longer has any eligible appointments in the bargaining unit being processed, i.e., the employee has transferred out of the unit.

Delete’ actions result in reporting records that contain the following information:

- Location
- Unit Code
- Employee ID

- Description of action
- Employee Name

II. Proposed Process

PPS Requirements:

1. Union Reporting – weekly and monthly processes

In cases where it is determined that employees are considered to have ‘transferred out’ of the unit (but who are *not* separated), the reporting should be modified as follows:

- 1.1. “Full” records must be written, containing all the data elements listed below. Fields being added with this request are noted with asterisks.

Employee Name (EDB0105)

Department (Home Department Code EDB0114) and Name (translated from Home Dept Table)

Home Dept address (from Home Dept Table)

Department Location Indicator (from Home Dept Table, if populated)*

Title Code (EDB2006)

Abbreviated Title Name (from TCT Table)

Appointment Pay Rate (EDB2014)

Percent Full Time (EDB2012)

Appointment Type (EDB2020)

Title Unit Code (EDB2029)*

Appointment Representation Code (EDB 2031)*

- 1.2. It is further requested that the appointment information included for reporting pertain to all eligible (i.e., not shift differential) appointments on the EDB, whether active or not and regardless of bargaining unit and appointment representation code.

2. Union Reporting File Detail Activity Record

The Union File Activity Record (produced from PPP770) should be modified for the additional fields above. Note that the modifications will require that the overall record length be expanded.

- 2.1. It is proposed that the following additional employee-level fields be added to the section of the record currently defined for positions 1-496:

- Department (Home Department Code, EDB0114)
- Department Location Indicator (from Home Dept Table, if populated)

- 2.2. It is also proposed that the following additional appointment-level fields be added to the section of the record that is currently defined for positions 497-991:

- Title Unit Code (EDB2029)
- Appointment Representation Code (EDB 2031)

2.3. For future expansion, it is proposed that additional space be added to the file and marked as “filler”.

See Attachment A for the revised file layout.

3. Union File Detail History Record

The Union File Detail History Record (produced from PPP770) should be modified as well for the additional fields above. Note that the modifications will require that the overall record length be expanded.

3.1. It is proposed that the following additional employee-level fields be added to the section of the record currently defined for positions 1-490:

- Department (Home Department Code, EDB0114)
- Department Location Indicator (from Home Dept Table, if populated)

3.2. It is also proposed that the following additional appointment-level fields be added to the section of the record that is currently defined for positions 491-984:

- Title Unit Code (EDB2029)
- Appointment Representation Code (EDB 2031)

3.3. For future expansion, it is proposed that additional space be added to the file and marked as “filler”.

See Attachment B for the revised file layout.

ATTACHMENT A – Revised Union File Detail Activity File Layout

Union Reporting File (PPP770) SR 82160				
Union Activity File Header Record				
Note: A tab delimiter value, 1 byte long (constant X'05'), is inserted between data fields.				
Position	Length/ Format	Field Description	Data Element #	Comments
1	1	Record Type		Value – Constant blank to denote header record
2	1			
3-4	2	Location – Key Field		2-character code indicating the Location ID
5	1			
6-7	2	Unit Code – Key Field		Exclusively represented unit
8	1			
9-17	9	Header ID – Key Field		Value – Constant blank
18	1			
19-26	8 mmddccyy	File Creation Date		
27-1265	1239	Filler		Value – Constant blank
1266	1	End of Record Flag		Value – Constant 'X'

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Union Activity File Detail Record

Note: A tab delimiter value, 1 byte long (constant X'05'), is inserted between data fields.

Position	Length/ Format	Field Description	Data Element #	Comments
1	1	ADC Update Code		Values: A – Add D – Delete C Change
2	1			Value – Constant X'05'
3-4	2	Location – Key field		2-character code indicating the Location ID
5	1			
6-7	2	Unit Code – Key Field		Exclusively Represented Unit
8	1			
9-17	9	Employee ID – Key Field		
18	1			
19-31	13	Action Description		Description of change
32	1			
33-58	26	Employee Name	EDB0105	
59	1			
60-63	4	Employee Name Suffix	EDB0106	
64	1			
65-94	30	Address Permanent Line One	EDB0204	
95	1			
96-125	30	Address Permanent Line Two	EDB0205	
126	1			
127-147	21	Address Permanent City	EDB0206	
148	1			
149-150	2	Address Permanent State	EDB0207	
151	1			
152-160	9	Address Permanent ZIP	EDB0208	
161	1			
162	1	Employee Organization Home Address Disclosure	EDB0247	
163	1			
164-173	10	Employee Home Phone	EDB0210	
174	1			
175	1	Employee Organization Phone Disclosure	EDB0248	
176	1			
177-186	10 ccyy-mm-dd	Most Recent Hire Date	EDB0113	
187	1			
188-197	10 ccyy-mm-dd	Earliest Appointment Begin Date in unit		
198	1			

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Union Activity File Detail Record

Note: A tab delimiter value, 1 byte long (constant X'05'), is inserted between data fields.

Position	Length/ Format	Field Description	Data Element #	Comments
199-208	10 ccyy-mm-dd	Latest Appointment Begin Date in unit		
209	1			
210-239	30	Home Department Address		From HME table
240	1			
241-270	30	Home Department Name		From HME table
271	1			
272-301	30	Employee Campus Work Address – Line 1	EDB0331	
302	1			
303-332	30	Employee Campus Work Address – Line 2	EDB0332	
333	1			
334-354	21	Employee Campus Work Address City	EDB0333	
355	1			
356-357	2	Employee Campus Work Address State	EDB0334	
358	1			
359-363	5	Employee Campus Work Address Zip	EDB0335	
364	1			
365-368	4	Employee Campus Work Address Zip + 4		
369	1			
370-379	10 ccyy-mm-dd	Employee Leave of Absence Begin Date	EDB0137	
380	1			
381-390	10 ccyy-mm-dd	Employee Leave of Absence Return Date	EDB0138	
391	1			
392-393	2	Leave of Absence Type Code	EDB0139	
394	1			
395-424	30	Leave of Absence Type Code Translation		From CTT table
425	1			
426-427	2	START Percentage	EDB0495	
428	1			
429-438	10 ccyy-mm-dd	START Begin Date	EDB0496	
439	1			
440-449	10 ccyy-mm-dd	START End Date	EDB0497	
450	1			

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Union Activity File Detail Record

Note: A tab delimiter value, 1 byte long (constant X'05'), is inserted between data fields.

Position	Length/ Format	Field Description	Data Element #	Comments
451-460	10 ccyy-mm-dd	Employee Separate Date	EDB0140	
461	1			
462-491	30	Separate Reason Code Translation		From CTT table
492	1			
493	1	Dues Deduction Indicator		Values – D (Regular Dues) F (Agency Fee) C (Conscientious Objector)
494	1			
495-500	6	Home Department Code	EDB0114	
501	1			
502	1	Department Location Indicator		From HME table
503	1			
504-533	30	FILLER		Value – constant blank For future expansion
534	1			
535-536	2	Number of reported Appointment Titles		Values: from 1 to 9
537- 1265	Occurs 9 times	Appointment data		(Each occurrence will be 81 columns) See Appointment Data below
1266	1	End of Record Flag		Value – Constant 'X'

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Union Activity File Detail Record – Appointment Data

Note: A tab delimiter value, 1 byte long (constant X'05'), is inserted between data fields.

Relative Position	Length/Format	Field Description	Data Element #	Comments
1	1			
2-5	4	Title Code	EDB2006	
6	1			
7-36	30	Abbreviated Title Name		From TCT tables
37	1			
38-47	10	Annualized Pay Rate	EDB2014	
48	1			
49-53	5	Percent Full Time	EDB2012	
54	1			
55	1	Appointment Type	EDB2020	
56	1			
57-58	2	Title Unit Code	EDB2029	
59	1			
60	1	Appointment Representation Code	EDB2031	
61	1			
62-81	20	FILLER		Value – constant blanks For future expansion

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Union Activity File Trailer Record

Note: A tab delimiter value, 1 byte long (constant X'05'), is inserted between data fields.

Position	Length/ Format	Field Description	Data Element #	Comments
1	1	Record Type		Value Constant 'T' to denote a trailer record
2	1			
3-4	2	Location		2-character code indicating the Location ID
5	1			
6-7	2	Unit Code		Exclusively represented unit
8	1			
9-17	9	Trailer ID		Value – Constant '999999999'
18	1			
19-27	9	Total number of activity records written for this unit		
28-1265	1238	FILLER		Value – Constant blank
1266	1	End of Record Flag		Value – Constant 'X'

ATTACHMENT B – Revised Union File Detail History File Layout

Union Reporting File (PPP770) SR 82160				
Union History File Header Record				
Note: A tab delimiter value, 1 byte long (constant X'05'), is inserted between data fields.				
Position	Length/ Format	Field Description	Data Element #	Comments
1-2	2	Header Location – Key field		2-character code indicating the Location ID
3	1			
4-5	2	Header Unit Code – Key Field		Value – Constant blank
6	1			
7-15	9	Header ID – Key field		Value – Constant blank
16-25	10 mm/dd/ccyy	File Creation Date		
26-1258	1233	Filler		Value – Constant blank

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Union History File Detail Record

Note: A tab delimiter value, 1 byte long (constant X'05'), is inserted between data fields.

Position	Length/ Format	Field Description	Data Element #	Comments
1-2	2	Location – Key field		2-character code indicating the Location ID
3	1			
4-5	2	Unit Code – Key Field		Exclusively Represented Unit
6	1			
7-15	9	Employee ID – Key Field		
16-25	10 mm/dd/ccyy	Creation Date		
26-51	26	Employee Name	EDB0105	
52	1			
53-56	4	Employee Name Suffix	EDB0106	
57	1			
58-57	30	Address Permanent Line One	EDB0204	
88	1			
89-118	30	Address Permanent Line Two	EDB0205	
119	1			
120-140	21	Address Permanent City	EDB0206	
141	1			
142-143	2	Address Permanent State	EDB0207	
144	1			
145-153	9	Address Permanent ZIP	EDB0208	
154	1			
155	1	Employee Organization Home Address Disclosure	EDB0247	
156	1			
157-166	10	Employee Home Phone	EDB0210	
167	1			
168	1	Employee Organization Phone Disclosure	EDB0248	
169	1			
170-179	10 ccyy-mm-dd	Most Recent Hire Date	EDB0113	
180	1			
181-190	10 ccyy-mm-dd	Appointment Begin Date	EDB2002	The earliest active appointment begin date
191	1			
192-201	10 ccyy-mm-dd	Latest Appointment End Date	EDB2003	The latest active appointment end date
202	1			
203-232	30	Home Department Address		From HME table
233	1			

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Union History File Detail Record

Note: A tab delimiter value, 1 byte long (constant X'05'), is inserted between data fields.

Position	Length/ Format	Field Description	Data Element #	Comments
234-263	30	Home Department Name		From HME table
264	1			
265-294	30	Employee Campus Work Address – Line 1	EDB0331	
295	1			
296-325	30	Employee Campus Work Address – Line 2	EDB0332	
326	1			
327-347	21	Employee Campus Work Address City	EDB0333	
348	1			
349-350	2	Employee Campus Work Address State	EDB0334	
351	1			
352-356	5	Employee Campus Work Address Zip	EDB0335	
357	1			
358-361	4	Employee Campus Work Address Zip + 4		
362	1			
363-372	10 ccyy-mm-dd	Employee Leave of Absence Begin Date	EDB0137	
373	1			
374-383	10 ccyy-mm-dd	Employee Leave of Absence Return Date	EDB0138	
384	1			
385-386	2	Leave of Absence Type Code	EDB0139	
387	1			
388-417	30	Leave of Absence Type Description		From CTT table
418	1			
419-420	2	START Percentage	EDB0495	
421	1			
422-431	10	START Begin Date	EDB0496	
432	1			
433-442	10	START End Date	EDB0497	
443	1			
444-453	10 ccyy-mm-dd	Employee Separation Date	EDB0140	
454	1			
455-484	30	Separation Reason Code Translation		From CTT table
485	1			

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Union History File Detail Record

Note: A tab delimiter value, 1 byte long (constant X'05'), is inserted between data fields.

Position	Length/ Format	Field Description	Data Element #	Comments
486	1	Dues Deduction Indicator		Values – D (Regular Dues) F (Agency Fee) C (Conscientious Objector)
487	1			
488-493	6	Home Department Code	EDB0114	
494	1			
495	1	Department Location Indicator		From HME table
496	1			
497-526	30	FILLER		Value – constant blanks For future expansion
527	1			
528-529	2	Number of reported Appointment Titles		Values: from 1 to 9
530- 1258	Occurs 9 times	Appointment Data		(Each occurrence will be 81 columns) See Appointment Data below

**Union Reporting File (PPP770)
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Union History File Detail Record – Appointment Data

Note: A tab delimiter value, 1 byte long (constant X'05'), is inserted between data fields.

Position	Length/ Format	Field Description	Data Element #	Comments
1	1			
2-5	4	Title Code	EDB2006	
6	1			
7-36	30	Abbreviated Title Name		From TCT tables
37	1			
38-47	10	Annualized Pay Rate	EDB2014	
48	1			
49-53	5	Percent Full Time	EDB2012	
54	1			
55	1	Appointment Type	EDB2020	
56	1			
57-58	2	Title Unit Code	EDB2029	
59	1			
60	1	Appointment Representation Code	EDB2031	
61	1			
62-81	20	FILLER		Value – constant blanks For future expansion