June 14, 1996

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Re:  Release: 1068
     Service Request: 12820
     Error Reports: 1330, 1442
     Programs: See inventory (Attachment A)
     DB2 Programs: See inventory (Attachment A)
     CICS Programs: See inventory (Attachment A)
     FOCEEXEC Members: See inventory (Attachment A)
     Copymembers: See inventory (Attachment A)
     Include Members: See inventory (Attachment A)
     DDL Members: See inventory (Attachment A)
     Bind Members: See inventory (Attachment A)
     CICS Maps: none
     Forms: See inventory (Attachment A)
     Table Updates: Bargaining Unit Table, Code Translation Table, Data Element Table,
                    Leave Accrual Code Table, Leave Rate Table, Processing Group
                    Table, Routine Definition Table, System Messages Table
     Urgency: Date Mandated (See Timing of Installation)

This release addresses changes to the Payroll/Personnel System (PPS) to fulfill the following requirements of Service Request 12820, dated May 28, 1996. The remainder of the requirements will be addressed at a later date. The release also corrects errors reported in Error Reports 1330 and 1402.

Service Request 12820

• The current four tier staff personnel program structure must be collapsed into one program called ‘Staff’. The Staff program will have two divisions, ‘Support Staff and Professionals’ and ‘Management and Senior Professional’, to identify differences in policy. Within the Management and Professional Group will be a subgroup, the Senior Management Group, consisting of all those in the Management and Senior Professional group who have an appointment Title Code (EDB 2006) value of 0001 through 0199. As of July 1, 1996 the Personnel Program Code (EDB 2007) values on the Employee Data Base (EDB) must change to reflect these new divisions. Executive, current code ‘E’, will become Senior Management Group, new code ‘2’. The appointment Title Code value for this group must be 0001 though 0199. Management and Professional (MAP), current code ‘M’, will become Management and Senior Professional Group, new code ‘2’, and must have a Title Code other than 0001 through 0199. Administrative and Professional Staff (A & PS), current code ‘P’, will be Support Staff and Professional Group, new code ‘1’. Staff, current code ‘S’, will be ‘Support
Staff and Professional Group, new code ‘1’. All non-academic Personnel Program Code values on the Employee Data Base (EDB) will be changed to the new values.

- The Appointment Begin Date (EDB 2002) must be changed to 07/01/96 on all those appointments which are active as of 7/1/96. Dates on appointments ending before 7/1/96 will not be changed. The Pay Begin Date (EDB 2053) for all distributions associated with appointments whose dates are being changed must be updated to 07/01/96 if the Pay Begin Date is earlier than 07/01/96 and the Pay End Date is later than 6/30/96.

- The Leave Accrual Code (EDB 2018) values for all for all current A&PS and Executive employees with a Hire Date (EDB 0113) earlier than 7/1/96 must be changed to a new code signifying that the minimum total employment service credit (i.e. Employment Service Credit (EDB 0719) plus Prior Service Months (EDB 0146) required for each Leave Accrual Code value will remain the same as it has been. The new “grandfathered” Leave Accrual Code values are as follows.
  
  ‘A’ becomes ‘G’
  ‘B’ becomes ‘H’
  ‘C’ becomes ‘J’
  ‘D’ becomes ‘K’

Employees with a Hire Date after 6/30/96 will have the old codes A, B, C, or D with the new minimum total employment service credit (ESC) amounts. Automatic derivation of Leave Accrual Code must become bargaining unit sensitive since the total minimum ESC for a bargaining unit may be set by labor contract.

- The Appointment Type Code (EDB 2020) value for all non-Academic employees with an Appointment Basis (EDB 2010) value of 9, 10 or 11 will be changed to ‘7’. The value of ‘7’ will signify “Partial-Year Career” positions.

- The History Data Base (HDB) must be updated to reflect that relevant appointments and distributions were ended on 6/30/96 and then that relevant appointments and distributions had their begin dates changed to 7/1/96.

- Modifications to existing EDB file maintenance consistency edits and monthly maintenance edits are also required for the new Personnel Program Code, Appointment Type and Leave Accrual Code values.

- Modify the existing Payroll Computation transaction edits to accept the new Appointment Type value of ‘7’.

- Modify the Payroll Computation process to allow non-represented employees to accrue factored vacation leave for any hours worked in a month rather than requiring these employees to be on pay status for one-half or more of the working hours in a month to be eligible for vacation. Sick leave retains the current policy of requiring the employee to be on pay status of one-half or more working hours in a month. This new policy will not apply to represented employees.

- The PAN Notification Distribution Classification (NDC) Codes must be changed to reflect the new personnel program group designations.

  The Applied Resources Security Manager (ARSM) rule which refers to personnel programs must be changed to reflect the new code values.

  The On-line EDB Employee Document generation process (IDOC function on-line) must be changed to display the correct translations for the new Personnel Program Code values.

**Error Report 1330**

This error report states that data dictionary code interpretations for Data Element PND0030 (Notification Distribution Classification Code) contain an incorrect value of ‘STAFFCARR’ for the code used for ‘Staff Career’. When this dictionary entry is translated to help text used on the EENT screen, ‘STAFFCARR’ is truncated to ‘STAFFCAR’, which is incorrect. The correct dictionary entry should be ‘STAFCARR’. 
The data dictionary entry for Data Element PND030 is corrected to ‘STAFCARR’, and the revised data dictionary is released.

**Error Report 1402**

On the EENT screen, positioning the cursor on the first occurrence of the Mandatory Address Indicator field shows field level help for PND0060 ‘Notification Distribution Mandatory Address Indicator’ which is correct. Positioning the cursor on the second or subsequent occurrences of the field shows field-level help for a different data element. Correcting the HELP anchors to indicate the correct data dictionary entries corrects this error.

The following changes to the Payroll/Personnel System have been made to fulfill the requirements listed above from Service Request 12820 and to fix the two errors. For a more complete description of these changes see the Detailed Design sent with this release.

**Programs**

The following program has been changed to fulfill HRMI Leave Accrual Code derivation requirements.

**PPAPTLAC**

The following programs have been changed to fulfill HRMI EDB edit requirements.

- **PPAPTRAT**
- **PPE1002**
- **PPE1053**

The following programs have been changed to fulfill HRMI Payroll Computation requirements.

- **PPEDTTEX**
- **PPLVHRS**

The following program has been modified to support changes to the Title Code Tables.

- **PPE1005**

The following programs have been changed to allow for a new Bargaining Unit Leave segment on the Bargaining Unit Table (BUT) of the Control Tables (CTL) and for the corresponding table on the History Control Tables (CDB).

- **PPP010**
- **PPPCDFET**

**DB2 Programs**

The following programs have been modified to support changes to the Title Code Table Structure.

- **PPCTLR33**
- **PPCTLR34**
- **PPCTLU33**
- **PPCTLU34**
- **PPEC005**
- **PPP003**
The following programs have been created or modified to support changes to the Bargaining Unit Table in both the CTL and the CDB.

- PPBULFET (new)
- PPBULHFT (new)
- PPBULHST (new)
- PPBULHUP (new)
- PPBUTUT2
- PPP741
- PPP851

The following programs have been changed to fulfill HRMI EDB edit requirements.

- PPCB01
- PDXPRPG
- PPEC001
- PPEC002
- PPEC051
- PPEC605 (new)
- PPEC611
- PPEI717
- PEM003
- PEXECLF
- PEXECSP
- PEXERPT
- PPPTITLE

The following programs have been changed to fulfill HRMI Leave Accrual Code derivation requirements.

- PEM009

The following programs have been changed to fulfill HRMI Payroll Computation requirements.

- PPEDTFT
- PPEDTPAY
- PPEDTRST
- PPP360

The following one time programs were written to change data in PPS data bases because of various HRMI requirements.
This one-time process creates appointment transactions to change the Title Code value to its current value for all non-academic appointments to trigger rederivation of the Personnel Program Codes. For all appointments current as of 7/1/96, it changes the Appointment Begin Date to 7/1/96, changes the Appointment End Date to its current value, and changes the Leave Accrual Code and Appointment Title Type where appropriate. For current appointments it also directly updates the Appointment End Date to 6/30/96 and creates Employee Change File (ECF) records reflecting that change. These ECF records will be run through the HDB update process. The program also creates distribution transactions for all distributions related to the appointments having their dates updated if the Distribution Begin Date is prior to 7/1/96 and the Distribution End Date is after 6/30/96. These distribution transactions will change the Distribution Begin Date to 7/1/96. File maintenance must be run to process these one-time transactions in order to update the EDB with the correct dates and the new Personnel Program Codes. Personnel Program Codes will be taken from the Title Code Table which will already have been converted using program PPO1068D.

This one-time process converts the PAN Notification Distribution Classification (PNDC) codes from ‘APS’, ‘STAFF’, ‘EXEC’, and ‘MAP’ to ‘SSP’, ‘SSP’, ‘SR MGMT’, and ‘MSP’ respectively.

This one-time process converts the Personnel Program codes ‘S’, ‘P’, ‘M’ and ‘E’ to ‘1’, ‘1’, ‘2’, and ‘3’ respectively on the Association Table (UC0ASC). See the Detailed Design for a complete explanation of this program.

This one time process converts the Title Code Tables in support of the HRMI requirements to change the personnel program codes ‘S’, ‘P’, ‘M’ and ‘E’ to ‘1’, ‘1’, ‘2’, and ‘2’ respectively.

*CICS Programs*

**UCPPPEDB**

This program has been changed to grant a user access to Senior Management (Title Codes 0001 through 0199) Employee Database records associated with Personnel Program ‘2’ only when an Association record containing a ‘3’ value for Access Rule PERPGM is defined for the user.

In addition, similar to the logic on existing Home Department range rule, logic for a new range rule of TITLERNG has been added.

**FOCEXEC Members**

The following reporting programs have been modified to recognize the new personnel program designations:

- PPFITCJA
- PPFITCS1
- PPFITCTA
Copymembers

The following Copymembers have been modified because of changes to the Title Code Table.
CPLNKTCL
CPLNKTCH
CPLNKTCU
CPWSNNTCL
CPWSXTCT

The following copymembers have been added or modified because of the creation of the Bargaining Unit Leave Table, PPPBUL, its corresponding VSAM BUT segment, and the corresponding history table PPPBULH.
CPWSBULH (new)
CPWSBUTI
CPWSWRKC
CPWSWRKP
CPWSXBBUT
CPWSXSTIF

The following copymembers have been modified because of changes to the Personnel Program Code values.
CPWSW888S
CPWSXIDC

DDL Members

The following DDL’s have been created because of the addition of the PPPBUL and PPPBULH Tables.
IXBULH0C (new)
IXBUL00C (new)
PPPVZBUL (new)
TBBULH0C (new)
TBBUL00C (new)
TSBULH0C (new)
TSBUL00C (new)

The following DDL’s have been added or modified because of changes to the Title Code Tables.
IXSGT00C
IXTPT00C
IXTPU00C
IXTPX00C
IXTPY00C
PPPVZSGT
PPPVZTPM
PPPVZTTPS
PPPVZTPT
PPPVZTPU
PPPVZTPX
PPPVZTPY
TBSGT00C
TBTPE00C
TBTPS00C
Include Members

The following include members have been created or modified to correspond to the views of the same name listed above.

- PPPVBULH (new)
- PPPVZBUL (new)
- PPPVXTPS
- PPPVXTPT
- PPPVZSGT
- PPPVZTPM
- PPPVZTPS
- PPPVZTPT
- PPPVZTPU
- PPPVZTPX
- PPPVZTPY

Bind Members

The following bind statements bind the plans for the correspondingly named one-time programs.

- PPO1068A (new)
- PPO1068B (new)
- PPO1068C (new)
- PPO1068D (new)

The following bind statement has been modified to include new DBRMLIB members created for update of the PPPBULH table.

PPP741

Forms

The following forms have been modified because of changes to the Title Code Table update process. Samples of these forms have been sent with the release.

- UPAY791
- UPAY792
- UPAY793
- UPAY795
- UPAY812
- UPAY831A
- UPAY831B

New form UPAY565D has been created for use in updating the Bargaining Unit Leave segment of the BUT Table. A sample of this form has been sent with the release.
Tables

Bargaining Unit Table
The default population minimum employment service credit values and associated leave accrual code values must be added to the new Bargaining Unit Leave segment of the Bargaining Unit Table, DB2 Table PPPBUL.

Transactions to update this table have been sent with the release as CARDLIB(BUTPROD) and should be used for production.

Code Translation Table
Code Translation Table additions must be made to support new personnel program and appointment type code values.

Transactions to update this table have been sent with the release and should be used for both test and production.

Data Element Table
Consistence Edit Routine 605 must be added to the following data elements:

Salary Grade (2008)
Title Code (2006)
Step (2049)

The value of ‘X’ must be deleted from the valid Salary Grade (2008) values.
The values of the Leave Accrual Code (2018) must be changed to A through H and J, K, N.

Transactions to update this table have been sent with the release and should be used for both test and production.

Leave Accrual Table
Currently, the Leave Accrual Table contains "default" entries for each personnel program. It is necessary to add default entries for each of the new personnel programs ("1" and "2"). It is also necessary to add TUC-specific entries to cover represented employees in each bargaining unit which is either exclusively represented or is in the process of bargaining. It is not necessary to delete the LAT entries for the now-obsolete personnel programs, and in fact, it is recommended that these entries not be deleted at this time.

Because of the differing fund ranges, leave utilization factors, and leave reserve account(s) in use at the campuses, it is impossible to provide completed transactions. Partially completed transaction forms are included as attachments to the Detailed Design to serve as a guideline.

Leave Rate Table
Policy under HRMI requires that all SSP and MSP employees accrue leave under the factored accrual method, in which a defined amount of leave is earned for each hour worked. The formerly-used "whole hour" accrual method may only be used for Academic employees. It is necessary to set up two factored-leave rate schedules.
The first schedule is used for covered, represented employees. If factored leave was in use prior to HRMI, this is the rate schedule to use for this group. It will be necessary to add Vacation and Sick Leave entries for the new leave accrual codes 'G', 'H', 'J', and 'K'. These new codes have identical maximums and hourly rates to codes 'A', 'B', 'C', and 'D', respectively. If factored leave was not in use, then it will be necessary to put in entries for all eight leave accrual codes. In all cases, the Pay Cycle code for Factored Leave is 'A'. Table 1 shows the relevant values for this schedule.

Table 1 - Covered, Represented Employees

<table>
<thead>
<tr>
<th>Leave Plan</th>
<th>Maximum Accrual</th>
<th>Hourly Rate</th>
<th>Maximum Accrual</th>
<th>Hourly Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>4160</td>
<td>.057692</td>
<td>(blank)</td>
<td>.046153</td>
</tr>
<tr>
<td>B</td>
<td>4160</td>
<td>.069231</td>
<td>(blank)</td>
<td>.046153</td>
</tr>
<tr>
<td>C</td>
<td>4160</td>
<td>.080769</td>
<td>(blank)</td>
<td>.046153</td>
</tr>
<tr>
<td>D</td>
<td>4160</td>
<td>.092308</td>
<td>(blank)</td>
<td>.046153</td>
</tr>
<tr>
<td>G</td>
<td>4160</td>
<td>.057692</td>
<td>(blank)</td>
<td>.046153</td>
</tr>
<tr>
<td>H</td>
<td>4160</td>
<td>.069231</td>
<td>(blank)</td>
<td>.046153</td>
</tr>
<tr>
<td>J</td>
<td>4160</td>
<td>.080769</td>
<td>(blank)</td>
<td>.046153</td>
</tr>
<tr>
<td>K</td>
<td>4160</td>
<td>.092308</td>
<td>(blank)</td>
<td>.046153</td>
</tr>
</tbody>
</table>

The second schedule is used for non-represented employees. This schedule is basically identical to the schedule used for represented employees except that the maximum vacation accrual factor is changed to permit an additional four months of accrual for these employees. Table 2 shows the relevant values for this schedule.

Table 2 - Non-Represented Employees

<table>
<thead>
<tr>
<th>Leave Plan</th>
<th>Maximum Accrual</th>
<th>Hourly Rate</th>
<th>Maximum Accrual</th>
<th>Hourly Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>4854</td>
<td>.057692</td>
<td>(blank)</td>
<td>.046153</td>
</tr>
<tr>
<td>B</td>
<td>4854</td>
<td>.069231</td>
<td>(blank)</td>
<td>.046153</td>
</tr>
<tr>
<td>C</td>
<td>4854</td>
<td>.080769</td>
<td>(blank)</td>
<td>.046153</td>
</tr>
<tr>
<td>D</td>
<td>4854</td>
<td>.092308</td>
<td>(blank)</td>
<td>.046153</td>
</tr>
<tr>
<td>G</td>
<td>4854</td>
<td>.057692</td>
<td>(blank)</td>
<td>.046153</td>
</tr>
<tr>
<td>H</td>
<td>4854</td>
<td>.069231</td>
<td>(blank)</td>
<td>.046153</td>
</tr>
<tr>
<td>J</td>
<td>4854</td>
<td>.080769</td>
<td>(blank)</td>
<td>.046153</td>
</tr>
<tr>
<td>K</td>
<td>4854</td>
<td>.092308</td>
<td>(blank)</td>
<td>.046153</td>
</tr>
</tbody>
</table>

Processing Group Table

The Processing Group Table must be updated to include the new con-edit routine PPEC005.

Transactions to update this table have been sent with the release and should be used for both test and production.

Routine Definition Table

The Routine Definition Table must be updated to include the new con-edit routine PPEC005.
Transactions to update this table have been sent with the release and should be used for both test and production.

**System Messages Table**

Appropriate error messages must be updated, added or deleted for issuance by programs PPEC002, PPEC051, PPEC605, PPEC611, PPEI002, PPEI053, PPP010 and the Title Code Table Maintenance programs PPP004, PPP030, and PPCTRLU33.

Transactions to update this table have been sent with the release and should be used for both test and production.

**Test Plan**

A complete test plan is included with the release. Campuses are encouraged to use the base system test materials, as well as augmenting them with any desired local tests.

**Installation Instructions**

An installation instruction document is included with the release.

**Timing of Installation**

This release is date mandated. It must be installed after the last compute has been run for which there is pay in June and before the first compute is run for which there is pay in July.

As usual, campuses are encouraged to install this release in as timely a fashion as possible, and in the normal numeric sequence of releases.

If there are any questions, please send electronic mail to Madelyn.Sano@ucop.edu, or call on (510) 987-0465 or send electronic mail to Jackson.Quan@ucop.edu, or call on (510) 987-0464.

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