This release is Phase III of the Human Resources Management Initiative (HRMI) project. It covers requirements in Service Request 14298 and its addendum.

**Service Request 14298**

Service Request 14298, dated May 29, 1996, and its addendum, dated August 16, 1996, ask that the Merit Processing programs be modified to recognize the Personnel Program Code (EDB 2007) values introduced with HRMI. It asks that the old roster types be replaced.

Roster type ‘1’ replaces old roster type ‘S’. Roster type ‘1’ includes appointments with a Personnel Program Code value of ‘1’ indicating Professional and Support Staff (PSS). However, if the month of the effective date on the specification record is ‘10’, then only those PSS appointments whose Title Codes (EDB 2006) have a grade look-up code value of ‘S’ or a Health Flag of ‘Y’ on the Title Code Table will be selected. These are Title Codes which used to have old Title Type ‘P’, indicating the old A&PS personnel program. If the month is not ‘10’, then only those PSS appointments whose Title Codes do not have a grade look-up code value of ‘S’ or a Health Flag of ‘Y’ on the Title Code Table will be selected. The Salary Grade (EDB 2008) must be displayed on this roster if it is available, otherwise the Step (EDB 2049) is displayed.
Roster type ‘2’ replaces old roster type ‘M’. Roster type ‘2’ includes appointments with a Personnel Program Code value of ‘2’, indicating Management and Support Staff (MSP), which do not have a Title Code value of 0001 through 0199.

Roster type ‘3’ replaces old roster type ‘E’. Roster type ‘3’ includes Senior Management appointments, i.e. MSP appointments which have Title Code value of 0001 through 0199.

Old roster types ‘P’ and ‘O’ have been eliminated. In addition, the Service Request asks that a merit control percent input via the run specification record be added for roster types 2 and 3. Report headings and several message texts must also be changed to reflect the new personnel program designations.

In order to fulfill these requirements program PPP670 and form UPAY 711 have been modified and several System Message Table texts have been changed.

**DB2 Programs**

**PPP670**

Roster types ‘S’ has been replaced by roster type ‘1’ with selection criteria dependent on the value of the month of the effective date. Roster type 1 includes appointments with a Personnel Program Code value of ‘1’. If the month of the effective date on the specification record is ‘10’, then only those PSS appointments whose Title Code has a grade look-up code value of ‘S’ or a Health Flag of ‘Y’ on the Title Code Table will be selected. If the month is not ‘10’, then only those PSS appointments whose Title Code does not have a grade look-up code value of ‘S’ or a Health Flag of ‘Y’ on the Title Code Table will be selected. Other selection criteria and input specification requirements remain the same as those for old roster type ‘S’. The value of the appointment Grade is now displayed on the employee detail line if it is present; otherwise the Step is displayed as it was for the old roster type ‘S’. The Grade is for display only and cannot be updated.

Roster type ‘M’ has been changed to roster type ‘2’. Roster type ‘2’ includes appointments with Personnel Program Code value of ‘2’, if the Title Code value is other than 0001 through 0199. Other selection criteria remain the same as those for old roster type ‘M’. The merit control percent has been added as required specification record input and displayed on the reports as for old roster type ‘S’.

Roster type ‘E’ has been changed to roster type ‘3’. Roster type ‘3’ includes appointments with Personnel Program Code value of ‘2’, if the Title Code value is 0001 through 0199. Reference to value ‘E’ has been changed to value ‘3’ if the Title Code value is 0001 through 0199. Other selection criteria remain the same as those for old roster type ‘E’. The merit control percent has been added as required specification record input and displayed on the reports as for old roster type ‘S’.

The roster types ‘O’ and ‘P’ have been eliminated.

**Forms**

**UPAY 711**

This form has been modified to show the new roster types 1, 2 and 3. A sample version of this form is available at http://www.ucop.edu/payroll/forms.htm.
**Table Updates**

**System Message Table**

Several entries must be made to update message texts for messages issued by program PPP670.

Transactions to update this table has been made available with the release in the PAYDIST.R1083.CARDLIB(MSGPROD) file and should be used for both test and production.

**Title Code Table**

The Title Code Table must be updated so that a value of ‘S’ is in the Covered Grade Look-up field or the Uncovered Grade Look-up field for most Title Codes which formerly had a Title Type value of ‘P’, signifying an A&PS title.

Transactions have been made available as PAYDIST.R1083.CARDLIB(TCTnn) file, where nn is the campus number. These transactions should be used in production. The base Title Code Table was updated using the transactions in file TCT03 as test transactions. These transactions were machine-generated and therefore, no UPAY 792 is included with the release.

This test Title Code Table was made available as part of PAYDIST.R1083.UDB2CTL and should be used for test purposes only.

**Test Plan**

Correct installation of the changes to program PPP670 can be tested by loading the EDB and CTL data bases available with this release as PDS’s UDB2EDB and UDB2CTL and then executing program PPP670 using JCL and files available with this release. The reports produced by running job RUN967 should be the same as those reports on the PAYDIST.R1083.REPORTS file.

Note that the PPP6701 reports show the new roster descriptions of Professional and Support Staff, Management and Senior Professional, and Senior Management.

All three rosters were run for both October, 1996 and January, 1997, both “preliminary” and “final”. The employees selected for rosters 2 and 3 should be the same for either month. However, the employees selected for roster 1 should be different for October and January. Only former A&PS employees should be selected for October. Only former Staff employees should be selected for January. An example of a former A&PS title is title code 7510 which appears on the first page of the October PPP6702 report. An example of a former Staff title code is 5538 which appears on page 2 or the January PPP6702 report.

Note that the merit control percent appears on the “final” reports of all three rosters.

**Installation Instructions**

Install this release as follows.

1. Modify program PPP670.
2. DB2-precompile, compile, and link PPP670 into the batch loadlib (LOADLIB).
3. Bind the plan for PPP670.
4. Perform the testing described above to ensure proper installation.
5. Perform any desired local testing.
6. Install the modified program in production.
7. Update the production Title Code Table by executing program PPP004 using the transactions made available with this release in the PAYDIST.R1083.CARDLIB(TCTnn) file, where nn is the campus number.
8. Update the production System Messages Table by executing program PPP010 using the transactions made available with this release in the PAYDIST.R1083.CARDLIB(MSGPROD) file.

**Run Instructions**

Program PPP670 should be run with the Specification Effective Date coded as ‘1096’ and Roster Type coded as ‘1’ to produce a roster of the former A&PS employees. To produce a roster of the former ‘Staff’ employees, the Specification Effective Date must be coded as a date other than ‘1096’. The roster for former ‘Staff’ employees would normally be coded with a Specification Effective Date of ‘0197’ for the January merits.

**Timing of Installation**

Installation of this release is urgent with installation of Release 1068. Prompt installation of this release is encouraged in order that merit rosters for the October 1, 1996, merit cycle may be produced and distributed per campus schedules.

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.

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