Service Request 13230

Service Request 13226 asked that the Payroll/Personnel System (PPS) retroactive payment process be modified to handle multiple overlapping retroactive merit and range adjustment processes as required by the agreement between UC and UPTE covering the TX unit. Although the specific requirements of that agreement served as guidelines, it was decided that a generic process should be developed that would serve any future multiple retroactive processes as well. Releases 1164 and 1170 were issued per the requirements of Service Request 13226.

Service Request 13230 resulted from the determination that employees who were excluded from the rate adjustments on the EDB per the TX agreement should also be excluded from retroactive payments. To be eligible for retroactive payments, TX employees must have been in the TX unit on 8/25/97 (the date of contract ratification) and 12/1/97 and must be employed at UC on the date of distribution.

Assuming that the campus awarded merits only to eligible employees, the retro merit process will only have data on eligible employees available to it.

The retro range process, which is title driven, selects PAR records for all employees who were in titles eligible for range adjustment during the several retroactive periods covered by the TX contract regardless of whether these employees were in the unit on 8/25/97 and 12/1/97.

A mechanism was needed to filter the retro range process so that employees who were in range adjusted TX titles during the several retroactive periods covered by the TX compensation article but who were not in the
TX unit on 8/25/97 and 12/1/97 will not receive a retroactive payment nor will they show as eligible on any reports generated during the retro processing.

The mechanism being used is the Retroactive Rate History (RRH) table. Since this table is created from data used in the prospective adjustment process, and presumably excluded employees who did not receive adjustments, this table should only contain entries for employees who were given a merit or range adjustment. The retroactive process has been changed to exclude selected PAR records if the employee does not have an entry on the RRH table for that Process Sequence. Note that excluded records are displayed on the PPP9408 report and can be corrected for processing where appropriate. Also note that exclusion from one Process Sequence does not preclude inclusion during another, providing the employee received an adjustment for that Process Sequence.

The campuses will need to handle the exclusion of individuals who are no longer employees on the date of distribution.

**DB2 Programs**

**PPP930**

PPP930 is the main retroactive process program. It has been modified to access the Retroactive Rate History table during multiple retroactive processes to determine if the employee ID on a selected PAR record has an entry on the Retroactive Rate History table for the Process Sequence. If it does not, then the selected record will be marked for exclusion. Excluded records are printed in a separate report in PPP9408, but can be coded and keyed for subsequent selection.

**PPP940**

PPP940 produces reports from the report file created by PPP930. It has been modified to recognize the new message associated with the Retroactive Rate History table exclusion, and to display the record on the PPP9408 Employee Earnings Distributions Excluded report.

**Table Updates**

**System Messages Table**

A new message indicating a non-match to the Retroactive Rate History table has been added to the System Message Table. See release form UPAY554 for the specific message.

**Test Plan**

A separate Test Plan has been provided with this release.

**Installation Instructions**

1. Modify programs PPP930 and PPP940.
2. DB2 pre-compile, compile and link batch programs PPP930 and PPP940.
3. Bind plans PPP930 and PPP940.
4. Perform the Test Plan.
5. Perform any local tests.
6. Run PPP010 to update the VSAM System Messages Table.
7. Run PPP851 to update the DB2 System Messages Table.
8. Install the programs in production.
Timing of Installation

The installation of this release is Urgent.

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

If there are any questions, please send electronic mail to Phil.Thompson@ucop.edu, or call at (510) 987-0468.

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