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Re: Release: 1219
Service Request: 14940
Error Report 1583
Programs: PPBENCHG, PPBENFET, PPBENUPD, PPO1219B(new), PPO1219C(new)
DB2 Programs: PPBENUT2, PPBENUTW, PPEG001, PPIIVR, PPI739, PPI740,
PPO1219A(new), PPP130, PPP627
CICS Programs: PPAPEUF, PPAPEUPU, PPWECEN, PPWERET, PPWIRET, PPWIRTR
Copymembers: CPWSRBEN, CPWSSWCH
Include Members: PPPVBEN1, PPPVBEN2, PPVVZBEN
DDL Members: PPPVBEN1, PPPVBEN2, PPVVZBEN
Bind Members: PPO1219A(new)
CICS Maps: PPECEN0, PPERET0, PPIRET0, PPIRTR0
Forms: None
Table Updates: Gross-to-Net Table, Data Element Table, Routine Definition Table, CICS Help
Urgency: Urgent (see Timing of Installation)

Service Request 14940

Service Request 14940 requested that the Payroll/Personnel System (PPS) be modified to maintain a 403(b) MAC Change Date.

UC Benefits determined that there is a need to know the date on which an employee's 403(b) Maximum Annual Contribution (MAC) limit is set on the Employee Data Base (EDB).

Employee MAC amounts are set annually by UCOP for employee records, which reside on the University payroll system at the beginning of each calendar year. They can also be calculated and set by the Campus Benefits Office during the year. When an employee separates from the University, the MAC is not recalculated or set to zero on the EDB. If the separated employee is rehired, the original MAC amount that was established prior to the separation remains on the EDB. This MAC amount may or may not be correct. Establishing a data element to indicate the most recent MAC change date helps in the determination of whether or not the MAC has been recalculated and corrected.

To facilitate the implementation of a MAC Change Date in PPS, UC Benefits determined that the existing data element, 403(b) Change Date, was no longer required. This data element was used to prevent multiple changes to salary reduction agreements (SRA) during a tax year. A change to federal regulations removed the one-change-per-year rule effective in 1998, and at that time the 403(b) Change Date field became merely notational. The 403(b) MAC Change Date has replaced the 403(b) Plan Change Date on the DB2 table and related objects.
Error Report 1583

Copylib member CPWSXIVR defines a 403(b) GTN translation table used to translate campus 403(b) GTN numbers to Base GTN numbers. Error Report 1583 reported that the same translation table was also hard coded in program PPIIVR. The hard coded table in PPIIVR has been replaced by inclusion of copylib member CPWSXIVR.

Programs

PPBENCHG
PPBENCHG is a standard part of the EDB Fetch/Update complex for the PPPBEN table. References to 403(b) Plan Change Date have been converted to reference 403(b) MAC Change Date.

PPBENFET
PPBENFET is a standard part of the EDB Fetch/Update complex for the PPPBEN table. References to 403(b) Plan Change Date have been converted to reference 403(b) MAC Change Date.

PPBENUPD
PPBENUPD is a standard part of the EDB Fetch/Update complex for the PPPBEN table. References to 403(b) Plan Change Date have been converted to reference 403(b) MAC Change Date.

PPO1219B(new)
PPO1219B is a one-time program used to initialize the 403(b) MAC Change Date on the UCRS History file. This avoids unnecessary UCRS updates due to the EDB initialization performed by one-time program PPO1219A.

PPO1219C(new)
PPO1219C is a one-time program used to initialize the 403(b) MAC Change Date on the IVR History file. This avoids unnecessary IVR updates due to the EDB initialization performed by one-time program PPO1219A.

DB2 Programs

PPBENUT2
PPBENUT2 is a standard part of the EDB Fetch/Update complex for the PPPBEN table. References to 403(b) Plan Change Date have been converted to reference 403(b) MAC Change Date.

PPBENUTW
PPBENUTW is a standard part of the EDB Fetch/Update complex for the PPPBEN table. References to 403(b) Plan Change Date have been converted to reference 403(b) MAC Change Date.

PPEG001
PPEG001 is an EDB File Maintenance consistency edit program. PPEG001 will only be triggered by changes to GTN 008, the Base MAC Limit GTN (see changes to the Gross-to-Net Table). Any time PPEG001 is triggered, the 403(b) MAC Change Date will be set to that day's date. It no longer calculates changes to 403(b) deductions.

PPIIVR
PPIIVR updates the IVR History File. The SQL SELECT of date from the PPPBEN table has been converted to refer to the new view name for 403(b) MAC Change Date. The hard coded 403(b) GTN translation has been replaced by inclusion of copylib member CPWSXIVR to fix Error Report 1583. CPWSXIVR and the program code could contain local modifications, but have matched. It should be confirmed that the copylib member contents match the replaced program code.

PPI739
PPI739 updates the UCRS History file with the new calendar year calculated 403(b) MAC Limits. PPI739 has been modified to set the 403(b) MAC Change Date to that day's date whenever a 403(b) MAC Limit is updated.
PPI740
PPI740 updates the UCRS History File each month. References to 403(b) Plan Change Date have been converted to reference 403(b) MAC Change Date.

PPO1219A(new)
PPO1219A is a one-time program used to initialize the 403(b) MAC Change Date on the EDB PPPBEN table. It should be run in non-update mode and the reported projected results reviewed prior to running it in update mode.

PPP130
PPP130 performs EDB Periodic Maintenance. During calendar year end processing, PPP130 resets any 403(b) MAC Limit that exceeds the default limit to the default limit. The default limit is defined by System Parameter 20. PPP130 has been modified to set the 403(b) MAC Change Date to that day's date whenever a 403(b) MAC Limit is changed to the default limit.

PPP627
PPP627 reports on leave of absence for employees, displaying university contribution indicator (UCI), furlough benefit account, and medical, dental and vision plan code data. 403(b) Plan Change Date was not used in the program, but will be deleted from the data selected from the PPPBEN table.

CICS Programs

PPAPEUFE
PPAPEUFE is the online EDB data entry edit driver. It previously set change flags for deductions based on changes in the GTN amount. It has been modified to also check a new switch which indicates that the 403(b) MAC Limit has been explicitly updated, even if to the same value. This will trigger a change in the 403(b) MAC Change Date.

PPAPEUPU
PPAPEUPU is the online EDB data entry update driver. It previously set change flags for deductions based on changes in the GTN amount. It has been modified to also check a new switch which indicates that the 403(b) MAC Limit has been explicitly updated, even if to the same value. This will trigger a change in the 403(b) MAC Change Date.

PPWECEN
PPWECEN is the screen processor program for the EDB Entry/Update Central Office Information screen. Code that referenced 403(b) Plan Change Date and related map fields and attributes has been deleted.

PPWERET
PPWERET is the screen processor program for the EDB Entry/Update Retirement Information screen. Code that referenced 403(b) Plan Change Date and related map fields and attributes has been converted to refer to 403(b) MAC Change Date and its related map fields and attributes.

PPWIRET
PPWIRET is the screen processor program for the EDB Inquiry Retirement/Savings-Department screen. Code that referenced 403(b) Plan Change Date and related map fields and attributes has been converted to refer to 403(b) MAC Change Date and its related map fields and attributes.

PPWIRTR
PPWIRTR is the screen processor program for the EDB Inquiry Retirement/Savings Programs screen. Code that referenced 403(b) Plan Change Date and related map fields and attributes has been converted to refer to 403(b) MAC Change Date and its related map fields and attributes.
Copylib Members

CPWSRBEN
CPWSRBEN defines a PPPBEN table row. The 403(b) Plan Change Date field has been converted to the 403(b) MAC Change Date field.

CPWSSWCH
CPWSSWCH defines various switches used across programs in the online EDB Entry/Update application. A new switch indicating that the 403(b) MAC Limit has been updated has been added. Program PPWECEN sets the switch "on" whenever an amount is entered successfully in the 403(b) MAC Limit field.

Include Members

PPPVBEN1
This Include member is a standard Include for a PPPBEN table row. The 403(b) Plan Change Date field has been converted to the 403(b) MAC Change Date field.

PPPVBEN2
This Include member is a standard Include for a PPPBEN table row. The 403(b) Plan Change Date field has been converted to the 403(b) MAC Change Date field.

PPPVBEN
This Include member is a standard Include for a PPPBEN table row. The 403(b) Plan Change Date field has been converted to the 403(b) MAC Change Date field.

DDL Members

PPPVBEN1
This Include member is one of the standard full table views for the PPPBEN table. The view name for 403(b) Plan Change Date has been converted to 403(b) MAC Change Date.

PPPVBEN2
This Include member is one of the standard full table views for the PPPBEN table. The view name for 403(b) Plan Change Date has been converted to 403(b) MAC Change Date.

PPPVBEN
This Include member is one of the standard full table views for the PPPBEN table. The view name for 403(b) Plan Change Date has been converted to 403(b) MAC Change Date.

Bind Members

PPO1219A(new)
PPO1219A is a plan bind for one-time program PPO1219A.

CICS Maps

PPECEN0
PPECEN0 is the map source for the EDB Entry/Update Central Office Information Screen. The label and field for 403(b) Plan Change Date has been deleted from the map.
PPERET0
PPERET0 is the map source for the EDB Entry/Update Retirement Information Screen. The label text for 403(b) Plan Change Date and internal map field names have been converted to 403(b) MAC Change Date.

PPIRET0
PPIRET0 is the map source for the EDB Inquiry Retirement/Savings-Department Screen. The label text for 403(b) Plan Change Date and internal map field names have been converted to 403(b) MAC Change Date.

PPIRTR0
PPIRTR0 is the map source for the EDB Inquiry Retirement/Savings Programs Screen. The label text for 403(b) Plan Change Date and internal map field names have been converted to 403(b) MAC Change Date.

Tables

Gross-to-Net Table
Only the GTN for the 403(b) MAC Limit, GTN008 in the Base system, should be coded with a Consistency Edit of 001. All the other GTN's having that Consistency Edit value, the GTN numbers for 403(b) deductions, have been updated to remove the Cons Edit 001 value.

Data Element Table
Data Element 0279 has been converted to 403(b) MAC Change Date. The Data Element Table has been updated to change its description.

Routine Definition Table
The Routine Definition Table has been updated to clarify the description of module PPEG001 which now only performs edits on the 403(b) MAC Limit amount and derives the 403(b) MAC Change Date.

CICS Help
Help text for data element 0279 has been converted to 403(b) MAC Change Date. Help text anchors have been modified for the four modified CICS maps.

Test Plan
A complete test plan is provided with this release. Campuses are encouraged to use the base system test materials, as well as performing any other desired local tests.

Installation Instructions
Separate Installation Instructions have been provided with the release.

Timing of Installation
This release is Urgent.

The one-time programs update the EDB, the UCRS History file and the IVR Employee History file. As a group, they keep those three entities in synch. Once PPO1219A has been run to update the EDB, PPO1219B should be run before the next run of PPI740 and PPO1219C should be run before the next run of PPIIVR. If this relationship is not maintained the result will be numerous updates in the UCRS and IVR process, respectively.
In addition, this release should be installed and PPO1291A should be run prior to the EDB Periodic Maintenance which performs 1998 calendar year-end processing. Otherwise, the 403(b) MAC Change Date will be not correct for those 403(b) MAC Limits reset to the default value during that processing.

The 403(b) MAC Change Date is set to the current system date in both EDB File Maintenance and PPI739 processing. In the Spring, when the 1999 403(b) MAC Limits are processed, PPI739 should be run on the same date as the EDB Maintenance in order to keep the EDB and UCRS History file in synch. Since the PPI739 run time is probably more predictable, running PPI739 right ahead of EDB File Maintenance is the better scenario for obtaining the same date on the EDB and the UCRS history file.

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

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