Service Request 15210
Expanded Benefits Eligibility for Employees

PPS Requirements

Final 9/26/00
Revised 11/01/00
Benefits Eligibility Project Workgroup
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Revisions 11/01/00***

These requirements were revised to incorporate the following additions, changes, and corrections:

1. EDB Monthly Maintenance must be modified so that Employee Paid Life Insurance and Employee Paid Disability Salary Base values are derived when the BELI is set to '1' because of achieving 1000 hours.
2. EDB Monthly Maintenance must be modified so that the UC Paid Life Insurance Salary Base value is derived when the BELI is set to '1' because of achieving 1000 hours.
3. Setting of the UC Paid Temporary Disability Insurance Indicator value was added to EDB Monthly Maintenance.
4. A change to EDB Monthly Maintenance to perform a calculation of the total hours toward eligibility prior to moving the Current Hours into the appropriate month buckets. This will allow for credit for any late hours that were recorded in the month to be totaled with the prior twelve months before the oldest month is 'lost'.
5. A change to EDB Explicit Maintenance to include new Retirement/FICA Derivation Indicator value 'R' in the edit associated with message 08-384.
6. Minor changes to the report layouts in Attachment F to include the decimal places for the display of total hours.

The details regarding these changes are included in the appropriate sections in this document.
Table of Contents

1.0 Background .................................................................................................................. 1

2.0 PPS Modifications ........................................................................................................ 3
   2.1 Overview ................................................................................................................... 3
   2.2 EDB Data Elements ................................................................................................. 5
      2.2.1 New Data Elements ......................................................................................... 5
      2.2.2 Existing Data Elements .................................................................................... 5
      2.2.3 Code Translation Table Entries ....................................................................... 5
   2.3 Required Hours Toward Benefits Eligibility ............................................................ 6
   2.4 Compute Modifications ............................................................................................ 6
   2.5 EDB Maintenance Modifications ............................................................................. 7
      2.5.1 Retirement/FICA Derivation Module ............................................................... 7
      2.5.2 EDB Monthly Maintenance ............................................................................. 8
      2.5.3 EDB Explicit Maintenance ............................................................................. 10
   2.6 History Modifications ............................................................................................. 11
   2.7 Reporting ................................................................................................................ 11
   2.8 On-line Screens and on-line Help .......................................................................... 12

3.0 Attachments ................................................................................................................... 14
1.0 Background

University of California, Human Resources and Benefits department, is modifying the eligibility rules for UCRP membership and, because eligibility for health and welfare benefits is based in part on UCRP membership, this proposed Plan change would also result in an expansion of health and welfare eligibility for employees affected by the retirement change. In addition to the current conditions of eligibility based on the percent time and duration of the employee’s appointment, an employee may alternately qualify for UCRP membership and initial health and welfare eligibility by accruing 1000 eligible hours on pay status in a consecutive 12 month period. Employees currently restricted from UCRP membership for other defined reasons, such as student status or per diem appointments will continue to be ineligible.

The change is effective January 1, 2001.

The main aspects of the plan change as they apply to implementation in the Payroll/Personnel System are as follows:

- Eligible hours on pay status in each month will be captured in the Payroll/Personnel System (PPS). Eligible hours are defined to be hours that count toward UCRP service credit. Hours are reported in the month associated with the pay period end date of the compute transaction. Hours reported under a per diem or casual/restricted appointment, or certain restricted titles, will not be captured.

- The employee will be eligible for UCRP membership and full (career) health and welfare benefits effective the first of the month following the month in which 1000 eligible hours have been recorded.

- The PPS will automatically set the employee's retirement and FICA status, and benefits eligibility level indicator when the employee has accumulated 1000 hours, if he is not otherwise restricted from membership.

- The existing PPS field 'Retirement/FICA Derivation Indicator' will be used to identify a rehired annuitant who has waived his eligibility to return to active UCRP status. A new value for this field will be established. When this value is set indicating a rehired annuitant has elected to waive UCRP participation, the system will not set the retirement, FICA, or Benefits Eligibility Level Indicator (BELI) for the employee when the usual required number of hours are recorded.
• Reports will be developed to provide departments and/or central offices with information about employees who have been put into UCRP when the 1000 hours are achieved, and those who are approaching the required hours for benefits eligibility.
2.0 PPS Modifications

2.1 Overview

In order to implement the revised policies and regulations regarding eligibility of employees for retirement and health and welfare benefits, numerous enhancements must be made to the Payroll/Personnel System (PPS). The changes are summarized in the following list. Detailed specifications are provided in the subsequent sections of this document.

1. New Employee Database (EDB) data elements must be added to hold the current month and prior 12 months worth of hours toward benefits eligibility, as well as total eligible hours for the prior 12 months.

   A new value must be supported for the existing data element 'Retirement/FICA Derivation Indicator' to identify rehired annuitants who waive UCRP participation. A new value must be supported for the existing data element 'Personnel Action Code - Employee' to indicate an automated enrollment into UCRP has occurred.

2. A mechanism for identifying the minimum number of hours required for retirement and health and welfare eligibility must be provided in PPS.

3. The Compute process will need to be modified to collect the employee's eligible hours into the appropriate monthly buckets.

4. EDB Monthly Maintenance will need several enhancements:

   a. It must be modified to "roll" the current month's hours into the appropriate monthly bucket and calculate the total for the prior 12 months.

   b. It must determine if the employee has reached the required number of hours for UCRP Eligibility, and if so, set the Retirement Code and FICA Eligibility Code appropriately.

   c. It must determine if the employee is newly eligible for benefits, and if so, set the BELI and assign default plan codes for medical, dental, and vision as appropriate.

   d. A Period of Initial Eligibility End Date must be derived for employees who are newly eligible for benefits because the minimum number of hours has been achieved.
5. **EDB Explicit Maintenance** will need the following enhancement:

   When an employee is rehired, the system must examine the new Hours Toward Benefits Eligibility data elements and determine how many hours the employee worked in the 12-month period prior to the month of rehire. If the numbers of hours equals or exceeds the minimum required hours for benefits eligibility, and the employee is otherwise eligible, the employee's record should indicate retirement and FICA eligibility, and eligibility for career-level health and welfare benefits.

6. The History data capture process must be modified. The new data element 'Total HoursToward Benefits Eligibility' should be added to the history database (HDB). It should be captured in the monthly periodic History run.

7. Reports must be provided to identify employees who achieved the 1000 eligible hours and were put into UCRP, and also to identify employees approaching the number of hours that will qualify them for UCRP and benefits eligibility.

8. On-line screens will need to be modified to display the data in the 'Hours Toward Benefits Eligibility' buckets. Because there is insufficient room on the existing EDB Inquiry screen IHRS, 'Hours on Pay Status', it is suggested that a new screen be developed for these new data elements.
2.2 EDB Data Elements

2.2.1 New Data Elements

Fourteen new data elements must be created to store the monthly hours toward eligibility and the total hours toward eligibility. It is suggested that data element numbers 5142 through 5155 be used for this purpose. This will enable the use of the hours balance array for processing of these data elements.

Draft data dictionary pages for these data elements are included as Attachment A.

2.2.2 Existing Data Elements

A new value will be added for existing data element EDB 0238, Retirement/FICA Derivation Indicator. This new value of 'R' will indicate that Retirement and FICA derivation should not be performed because the employee is a rehired annuitant who has waived future active participation in UCRP.

A new value will be added for existing data element EDB 0001, Personnel Action Code - Employee level, and for the equivalent data elements EDB 0002 and 0003. The new value of '22' will indicate automated enrollment into UCRP during monthly maintenance.

Draft data dictionary pages for these data element are included as Attachment B.

2.2.3 Code Translation Table Entries

Entries must be made in the Code Translation Table (CTT) for the new data element values. The required entries are:

<table>
<thead>
<tr>
<th>Data element</th>
<th>Length</th>
<th>Value</th>
<th>Translation</th>
</tr>
</thead>
<tbody>
<tr>
<td>EDB 0238</td>
<td>20</td>
<td>R</td>
<td>Not elig rehired ret</td>
</tr>
<tr>
<td>EDB 0001</td>
<td>21</td>
<td>22</td>
<td>Retirement derived - hrs</td>
</tr>
<tr>
<td>EDB 0001</td>
<td>27</td>
<td>22</td>
<td>Retirement derived - hours</td>
</tr>
</tbody>
</table>
2.3 **Required Hours Toward Benefits Eligibility**

It is suggested that the minimum required hours to achieve eligibility be stored in the System Parameter Table.

2.4 **Compute Modifications**

The compute process must be modified to accumulate the eligible hours in the new Hours Toward Benefits Eligibility buckets. The hours should be collected as follows:

First, the Appointment Type from the PAR record should be checked. If the Appointment Type associated with the pay distribution is '4' (Casual Restricted) or '6' (Per Diem), the hours should **not** be added to the Hours Toward Benefits Eligibility buckets. Note that if the Appointment Type is blank, it should be treated as if it is **not** '4' or '6'.

Next, the Title Code from the PAR record should be checked. If the CTO is '323' or '446' or '523', or '533' or '543' or '623' or '723' **OR** the Title code is '2090' or '3370', or '1958' or '1968' the hours should **not** be added to the Hours Toward Benefits Eligibility buckets. Note that if the Title Code is missing or not found on the Title Code Table, it should be treated as if it is **not** an excluded CTO or Title Code.

Next, the Description of Service (DOS) Code from the PAR record should be checked. If the DOS Code has the following attributes the hours associated with the earnings should be included in the appropriate bucket:

- a DOS Table UCRP Gross Indicator with a value of '+' or '-', indicating that the amount is added to the UCRP gross, and
- a DOS Table Hours on Pay Status Indicator with a value of 'Y'.

The appropriate Hours Toward Benefits Eligibility bucket should be determined by using the pay period end date of the compute transaction. For current month pay, the hours should be added to or subtracted from the Hours Toward Benefits Eligibility - Current Month data element. For late pay, the hours should be added or subtracted from the Hours Toward Benefits Eligibility - MonthX, where MonthX is the month associated with

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1 Note that this corresponds to logic used in the UCRP Interface program when reporting hours for service credit to UCRP.
the pay period end date of the pay transaction. If the pay is for a pay period more than 12 months prior to the current month, it should not be added to any bucket.

For example, an employee is hired December 17, 2001. Because of delays in establishing his EDB record, he is not paid on the monthly compute with a 12/31/01 pay period end date. In the compute for pay period end date 1/31/02, in addition to his regular pay for January, a late pay transaction is processed with a pay period end date of 12/31/01. The current pay hours are added to the current month (January) bucket, and the late pay hours are added to the December 2001 bucket.

2.5 EDB Maintenance Modifications

2.5.1 Retirement/FICA Derivation Module

Currently the Retirement/FICA Derivation Module evaluates several criteria to determine the appropriate values for the Retirement System Code (EDB 0120) and FICA Eligibility Code (EDB 0122). Among these criteria are:

- Retirement/FICA Derivation Indicator
- Current Retirement Code value
- Employment Status
- Appointment Type
- Title Code and Class Title Outline (CTO)
- Student Status
- Duration and percent time of appointment

It is suggested that the Retirement/FICA Derivation Module be modified to treat a Retirement/FICA Derivation Indicator value of 'R' the same as a value of 'N'. Additionally, the module should evaluate the Total Hours Toward Benefits Eligibility at rehire and during monthly maintenance. The test for the minimum hours of eligibility should be equivalent in the derivation criteria to duration and percent time of appointment; that is, the employee either has an appointment that qualifies based on duration and percent time, OR the employee has accumulated 1000 hours. All other criteria that might serve to disqualify an employee for UCRP membership, such as title code or student status, would still apply.
2.5.2  **EDB Monthly Maintenance**

Several modifications must be made to the EDB Monthly Maintenance process.

1. ***The hours for the previous twelve months should be totaled before counting the hours from the month just ended. This will allow any late pay to be considered before the earliest month from the prior year is eliminated. If the total is equal to or greater than 1000 hours, the employee record should be flagged. See step 3 below.***

2. The hours in the 'Hours Toward Benefits Eligibility - Current Month' bucket must be moved into the 'Hours Toward Benefits Eligibility - monthx' bucket, where monthx is the month being ended by monthly maintenance. For example, in monthly maintenance to end January and begin February, the hours from the current month bucket should be moved to the January hours bucket, overlaying any hours in the bucket prior to monthly maintenance. The 'Hours Toward Benefits Eligibility - Current Month' bucket should be set to zero.

3. The hours for the last twelve months should then be totaled. If the total is equal to or greater than the eligibility threshold (currently defined as 1000 hours), ***or if the record was flagged in step 1, above,*** the FICA/Retirement Derivation module should be invoked.

4. The FICA/Retirement Derivation module should determine if the employee is eligible using the derivation logic described in the previous section.

5. If the employee qualifies for UCRP membership **because of 1000 hours**, and the Assigned BELI (EDB 0360) is not equal to '1', the system should additionally do the following:

   a. Set the Assigned BELI (EDB 0360) to '1'.

   b. Set the BELI Effective Date (EDB 0341) to the first of the month being started by monthly maintenance.

   c. Set the BELI Change Date (EDB 0183) to the first of the month being started by monthly maintenance.

   d. Set the Period of Initial Eligibility End Date (EDB 0751) to 30 days later than the first of the month being started by monthly maintenance.

   e. If the Medical Plan Code (EDB 0292) is blank or 'XD' or 'XC', or if the Medical Plan Code is some other value but the
Medical Coverage End Date (EDB 0300) is prior to the first of the month being started by monthly maintenance:

- set the Medical Plan Code to 'DM'
- set the Medical Coverage Code (EDB 0293) to 'U'
- set the Medical Plan Coverage Effective Date (EDB 0294) and Medical Employee Coverage Effective Date (EDB 0454) to the first day of the month being started by monthly maintenance
- set the Medical Plan Coverage End Date (EDB 0300) to initial values
- set the Medical Opt Out Indicator (EDB 0377) to blank

f. If the Dental Plan Code (EDB 0272) is blank or 'XD' or 'XC', or if the Dental Plan Code is some other value but the Dental Coverage End Date (EDB 0271) is prior to the first of the month being started by monthly maintenance:

- set the Dental Plan Code to 'DD'
- set the Dental Coverage Code (EDB 0273) to 'U'
- set the Dental Plan Coverage Effective Date (EDB 0274) and Dental Employee Coverage Effective Date (EDB 0455) to the first day of the month being started by monthly maintenance
- set the Dental Plan Coverage End Date (EDB 0271) to initial values
- set the Dental Opt Out Indicator (EDB 0378) to blank

g. If the Vision Plan Code (EDB 0347) is blank or 'XD', or if the Vision Plan Code is some other value but the Vision Coverage End Date (EDB 0346) is prior to the first of the month being started by monthly maintenance:

- set the Vision Plan Code to 'DV'
- set the Vision Coverage Code (EDB 0348) to 'U'
- set the Vision Plan Coverage Effective Date (EDB 0349) and Vision Employee Coverage Effective Date (EDB 0456) to the first day of the month being started by monthly maintenance
- set the Vision Plan Coverage End Date (EDB 0346) to initial values
- set the Vision Opt Out Indicator (EDB 0379) to blank

6. If the Retirement Code is changed from 'H' or 'N' to 'U', and the DCP Plan Code (EDB 0129) is not 'S', the DCP Plan Code should be set to 'S'.
7. If the Retirement Code is changed to 'U', an employee level Action Code (EDB 0001) of '22' should be generated, with an effective date equal to the first of the month being started by monthly maintenance. Note that this should occur both when the retirement eligibility is achieved because of 1000 hours and when eligibility is achieved because of an appointment becoming active.

8. If the Retirement Code is changed to 'U', the UC Paid Temporary Disability Insurance Code (EDB 0123) should be set to 'A'. Note that this should occur both when the retirement eligibility is achieved because of 1000 hours and when eligibility is achieved because of an appointment becoming active.

9. If the Assigned BELI is changed to '1', derivations should be performed to populate the Employee Paid Disability (EPD) Salary Base (EDB 0232) and the Employee Paid Life Insurance Salary Base (EDB 0275).

10. If the Assigned BELI is changed to '1', and the current value of UC Paid Life Insurance Salary Base (EDB 0330) is zero, derivation of the UC Paid Life Insurance Salary Base should be performed, and the UC Paid Life Insurance Coverage Effective Date (EDB 0451) should be set to the first day of the month being started by monthly maintenance.

Two reports should be produced in the EDB Monthly Maintenance process. These reports are described separately in the Reporting section of this document.

2.5.3 **EDB Explicit Maintenance**

The rehire process must be modified to check for employees who may have retirement eligibility from past service. This should be done as follows when a Rehire Action (Personnel Action Code (EDB 0001)) of '02' is used:

The Hours Toward Benefits Eligibility for the 12 months prior to the month of the hire date should be totalled.

If the total is equal to or greater than the minimum required Hours Toward Benefits Eligibility, the system should perform derivations for retirement, FICA, and benefits as follows:

If the Retirement/FICA Derivation Indicator (EDB0238) is 'N' or 'R', no retirement/FICA derivation should be performed, otherwise, the total
number of hours should be considered in the retirement/FICA derivation process.

Unlike the monthly maintenance process, the Assigned BELI should NOT be derived in the rehire process when the Retirement Code is set to 'U' because of having 1000 Hours Toward Benefits Eligibility. Existing edits will notify the user if the Assigned BELI is inconsistent with the retirement code.

***Currently message 08-384, 'RET/FICA DERIVE IS 'N'; RET CAN'T BE BLANK, CHANGE WILL BE BLOCKED', is issued when the Retirement/FICA Derivation Indicator (EDB 0238) is 'N' and no retirement code is present. The edit associated with this message should be modified so that 08-384 is also issued when the Retirement/FICA Derivation Indicator is 'R' and no retirement code is present. The message text should be changed to 'RET/FICA DERIVE IS 'N' OR 'R', RETIREMENT CD CAN'T BE BLANK'. The on-line and batch severity for this message should be Employee Reject.

2.6 History Modifications

The History Monthly data capture process should be modified to capture the Total Hours Toward Benefits Eligibility.

2.7 Reporting

A report should be provided to identify employees whose retirement and health and welfare status have changed because of achieving 1000 eligible hours. This report should be titled "Employees With 1000 Eligible Hours - Retirement set to 'U'. It is suggested that this report be produced by the EDB Periodic Monthly Maintenance process.

A report should also be provided to identify employees who are approaching 1000 eligible hours. This report should be titled "Employees Approaching 1000 Eligible Hours". Each location should have the ability to set the threshold at which an employee should be displayed on the 'approaching eligibility' report. It is therefore suggested that the number of hours for this threshold be stored in the System Parameter Table.

Employees should be selected for the "Employees with 1000 Eligible Hours - Retirement set to 'U'" report if the Retirement Code was set to 'U' in Monthly Maintenance because the Total Hours Towards Benefits Eligibility reach 1000 hours in monthly maintenance. In other words, employees whose retirement code was set to 'U' for other reasons should not be
included on the report. The following data should be included on the report.

Home Department Code (EDB 0114)
Home Department name from Home Department Table
Employee ID
Employee Name (EDB 0105)
Total Hours Toward Eligibility (new data element)
Employment Status (EDB 0144)
Hire Date (EDB 0113)
Previous Retirement Code value (EDB 0122)
New Retirement Code value
Previous FICA Eligibility Code value (EDB 0120)
New FICA Eligibility Code value
Previous Assigned BELI value (EDB 0360)
New Assigned BELI value
Derived BELI (EDB 0375)

Employees should be selected for the "Employees Approaching 1000 Hours" report if all the following are true:

- the Total Hours Toward Eligibility is **1000*** equal to or greater than the established threshold for reporting
- the Retirement Code is 'H' or 'N'
- the Retirement/FICA Derivation Indicator is not 'N' or 'R'
- the Employment Status is not 'S'
- the employee has one or more active appointment that is NOT Appointment Type (EDB 2020) '4' (casual/restricted) or '6' (per diem), and where the title is not restricted by title code or CTO as outlined in the compute section.

All the same data should be displayed as for the first report, except that previous values of Retirement Code, FICA Eligibility Code, and Assigned BELI are not needed.

*** The report should be sorted in Employee Name order within Home Department order, with a page break on Home Department. A total number of employees per department should be displayed.

Report samples are shown as Attachment F.

### 2.8 On-line Screens and on-line Help

A new EDB Inquiry screen should be developed to display the Hours Toward Benefits Eligibility data.
A sample screen is shown as Attachment C.

Field level help should be provided for each data element on the new screen. Screen level help should be developed for the new screen.

Suggested text for the screen level help is shown as Attachment D.

The Total Hours Toward Benefit Eligibility should be displayed on the History IMTH screen.

A sample screen is shown as Attachment E.

Field level help should be provided for the new data element on the IMTH screen.
Screen level help for the IMTH screen should be modified as follows:

Current text "Nature of Information: IMTH (UMTH) contains monthly accumulators for retirement gross pay and retirement reductions." should be modified to read "Nature of Information: IMTH (UMTH) contains monthly accumulators for retirement gross pay and retirement reductions and total hours towards benefits eligibility."
3.0 Attachments

A. New EDB Data Elements
B. Revised EDB Data Elements
C. New On-line Screen
D. Screen level Help text
E. IMTH History Screen
F. Report Samples for Monthly Maintenance
System Number:          EDB 5142
User Access Name:       5142-x
Programming Name:
Revision Date:
Comments:
Source(s):              PPP390, PPP130
Use(s):
Location(s):
Name:                   Hours Toward Benefits Eligibility - Total
Type:                   Numeric
Length:                 9
Format:                 nnnnnnnn.nn

General Description:

The total number of hours that qualify toward eligibility for retirement and benefits. This excludes overtime, differential, hours worked as casual restricted, per diem, etc.

Code Interpretation:

N/A
System Number: EDB 5143

User Access Name: 5143-x

Programming Name:

Revision Date:

Comments:

Source(s): PPP390, PPP130
Use(s):
Location(s):

Name: Hours Toward Benefits Eligibility - Current Month

Type: Numeric

Length: 9

Format: nnnnnnnn.nn

General Description:

The total number of hours reported in the current month that qualify toward eligibility for retirement and benefits. This excludes overtime, differential, hours worked as casual restricted, per diem, etc.

Code Interpretation:

N/A
System Number: EDB 5144
User Access Name: 5144-x
Programming Name:
Revision Date:
Comments:
Source(s): PPP390, PPP130
Use(s):
Location(s):
Name: Hours Toward Benefits Eligibility - January
Type: Numeric
Length: 9
Format: nnnnnnn.nn

General Description:

The total number of hours reported in January that qualify toward eligibility for retirement and benefits. This excludes overtime, differential, hours worked as casual restricted, per diem, etc.

Code Interpretation:

N/A
System Number: EDB 5145

User Access Name: 5145-x

Programming Name:

Revision Date:

Comments:

Source(s): PPP390, PPP130

Use(s):

Location(s):

Name: Hours Toward Benefits Eligibility - February

Type: Numeric

Length: 9

Format: nnnnnnn.nn

General Description:

The total number of hours reported in February that qualify toward eligibility for retirement and benefits. This excludes overtime, differential, hours worked as casual restricted, per diem, etc.

Code Interpretation:

N/A
**System Number:** EDB 5146

**User Access Name:** 5146-x

**Programming Name:**

**Revision Date:**

**Comments:**

**Source(s):** PPP390, PPP130

**Use(s):**

**Location(s):**

**Name:** Hours Toward Benefits Eligibility - March

**Type:** Numeric

**Length:** 9

**Format:** nnnnnnnn.nn

**General Description:**

The total number of hours reported in March that qualify toward eligibility for retirement and benefits. This excludes overtime, differential, hours worked as casual restricted, per diem, etc.

**Code Interpretation:**

N/A
System Number: EDB 5147
User Access Name: 5147-x
Programming Name:
Revision Date:
Comments:

Source(s): PPP390, PPP130
Use(s):
Location(s):

Name: Hours Toward Benefits Eligibility - April
Type: Numeric
Length: 9
Format: nnnnnnn.nn

General Description:
The total number of hours reported in April that qualify toward eligibility for retirement and benefits. This excludes overtime, differential, hours worked as casual restricted, per diem, etc.

Code Interpretation:
N/A
System Number:   EDB 5148

User Access Name:  5148-x

Programming Name:

Revision Date:

Comments:

Source(s):   PPP390, PPP130
Use(s):
Location(s):

Name:       Hours Toward Benefits Eligibility - May

Type:       Numeric

Length:     9

Format:     nnnnnnnn.nn

General Description:

The total number of hours reported in May that qualify toward eligibility for retirement and benefits. This excludes overtime, differential, hours worked as casual restricted, per diem, etc.

Code Interpretation:

N/A
Name: Hours Toward Benefits Eligibility - June
Type: Numeric
Length: 9
Format: nnnnnnn.nn

General Description:
The total number of hours reported in June that qualify toward eligibility for retirement and benefits. This excludes overtime, differential, hours worked as casual restricted, per diem, etc.

Code Interpretation:
N/A
System Number: EDB 5150

User Access Name: 5150-x

Programming Name:

Revision Date:

Comments:

Source(s): PPP390, PPP130
Use(s):
Location(s):

Name: Hours Toward Benefits Eligibility - July

Type: Numeric

Length: 9

Format: nnnnnnn.nn

General Description:

The total number of hours reported in July that qualify toward eligibility for retirement and benefits. This excludes overtime, differential, hours worked as casual restricted, per diem, etc.

Code Interpretation:

N/A
System Number: EDB 5151
User Access Name: 5151-x
Programming Name:
Revision Date:
Comments:
Source(s): PPP390, PPP130
Use(s):
Location(s):
Name: Hours Toward Benefits Eligibility - August
Type: Numeric
Length: 9
Format: nnnnnnnn.nn

General Description:
The total number of hours reported in August that qualify toward eligibility for retirement and benefits. This excludes overtime, differential, hours worked as casual restricted, per diem, etc.

Code Interpretation:
N/A
Name: Hours Toward Benefits Eligibility - September
Type: Numeric
Length: 9
Format: nnnnnnn.nn

General Description:
The total number of hours reported in September that qualify toward eligibility for retirement and benefits. This excludes overtime, differential, hours worked as casual restricted, per diem, etc.

Code Interpretation:
N/A
General Description:

The total number of hours reported in October that qualify toward eligibility for retirement and benefits. This excludes overtime, differential, hours worked as casual restricted, per diem, etc.

Code Interpretation:

N/A
System Number:    EDB 5154
User Access Name:  5154-x
Programming Name:

Revision Date:

Comments:

Source(s):        PPP390, PPP130
Use(s):            
Location(s):       

Name:          Hours Toward Benefits Eligibility - November
Type:              Numeric
Length:            9
Format:          nnnnnnnn.nn

General Description:

The total number of hours reported in November that qualify toward eligibility for retirement and benefits. This excludes overtime, differential, hours worked as casual restricted, per diem, etc.

Code Interpretation:

N/A
System Number: EDB 5155

User Access Name: 5155-x

Programming Name:

Revision Date:

Comments:

Source(s): PPP390, PPP130
Use(s):
Location(s):

Name: Hours Toward Benefits Eligibility - December

Type: Numeric

Length: 9

Format: nnnnnnn.nn

General Description:

The total number of hours reported in December that qualify toward eligibility for retirement and benefits. This excludes overtime, differential, hours worked as casual restricted, per diem, etc.

Code Interpretation:

N/A
**System Number:** EDB 0238

**User Access Name:** 0238-5

**Programming Name:** RET_FICA_DERIVE IN PPPPAY

**Revision Date:** 07/01/97

**Comments:**

**Source(s):**

**Use(s):**

**Location(s):**

**Name:** RETIREMENT/FICA DERIVATION INDICATOR

**Type:** Alphanumeric

**Length:** 1

**Format:**

N/A

**General Description:**

Code indicating whether the Retirement System Code (EDB 0122) and the FICA Eligibility Code (EDB 0120) should be automatically derived by the system.

**Code Interpretation:**

N - Do not derive EDB0122 and EDB0120
Y - Derive EDB0122 and EDB0120
L - Derive EDB0122 and EDB0120 using special derivation rules for UCRP members who, in 1976, made a lifetime election not to be coordinated with FICA.
1 - Derive EDB0122 and EDB0120 using special derivation rules for a rehire whose prior Retirement/FICA Derivation Indicator had a value of "Y"
2 - Derive EDB0122 and EDB0120 using special derivation rules for a rehire whose prior Retirement/FICA Derivation Indicator had a value of "L"
3 - Derive EDB0122 and EDB0120 using special derivation rules for a rehire whose prior Retirement/FICA Derivation Indicator had a value of "N"
R - Do not derive EDB0122 and EDB0120; employee is a rehired annuitant who has waived re-entry rights
System Number: EDB0001

User Access Name: 0001-1

Programming Name: ACTION_CODE IN PPPACT

Revision Date: xx/xx/xx

Comments:
Source(s): PPP120
Use(s): Reporting
Location(s): CPS 0933 – Personnel Action Code 1 (Coding is Different)
CPS 2786 – Personnel Action Code 2 (Coding is Different)
CPS 2787 – Personnel Action Code 3 (Coding is Different)
CPS 2788 – Personnel Action Code 4 (Coding is Different)
CPS 2789 – Personnel Action Code 5 (Coding is Different)
See also:
APS 0933, 2786, 2787, 2788, 2789
IPS 0933, 2786, 2787, 2788, 2789
OPP 0933, 2786, 2787, 2788, 2789

Name: PERSONNEL ACTION CODE-1

Type: ALPHANUMERIC

Length: 2

Format:
N/A

General Description:
Code indicating the personnel action which affected an employee record.

Code Interpretation:

01 – Initial employment
02 – Employment with prior service
06 – Separation
07 – Leave with pay
08 – Leave without pay
09 – Change in return date
15 – Visa status change
19 – Department transfer
20 – Other
21 – Intercampus action
22 – Enrollment into UCRP in monthly maintenance
23 – Change in Benefits Eligibility Level Indicator-Assigned
30 – Mass purge
35 – Transfer between a campus and the Office of the President
36 – Transfer between a campus and a laboratory or the state
51 – Transfer to/from a medical center
New EDB Inquiry Screen
"Hours Toward Eligibility"
Help Text For
"Hours Toward Eligibility" Screen

EDBHxxxx Help EDB Hours Toward Eligibility

More: +

Function: xxxx displays hours toward benefits eligibility for the current month and each of 12 prior months.

Nature of Information: IHRS displays hours toward benefits eligibility for each month in which earned, as well as total hours for the previous twelve months. All hours toward benefits eligibility fields are system derived.
## Changes to IMTH screen

<table>
<thead>
<tr>
<th>PPIMTH-xxxxx</th>
<th>History Inquiry</th>
<th>07/17/00 23:24</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monthly Accumulators</td>
<td>Userid: PAYPCW</td>
<td></td>
</tr>
<tr>
<td>ID: 000050020 Name: ABSENT,MARCUS</td>
<td>SSN: 555-55-5020</td>
<td></td>
</tr>
<tr>
<td>Incorrect Flag:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Retirement Gross: | |                |
| Retirement Reduction: | |                |

#### Hours Toward Benefits Eligibility:

<table>
<thead>
<tr>
<th>Next Func:</th>
<th>ID:</th>
<th>Name:</th>
<th>SSN:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

```plaintext
>>> F: 1-Help 3-PrevMenu 4-Print 5-GenDoc
F: 9-Jump 12-Exit
```
## Monthly Maintenance Report Samples

**DEPARTMENT:** 345608 Department of English

<table>
<thead>
<tr>
<th>EMP ID</th>
<th>NAME</th>
<th>HRS TOWARD</th>
<th>EMP STATUS</th>
<th>HIRE DATE</th>
<th>RETIREMENT/FICA CODES</th>
<th>ASSIGNED BELI</th>
<th>DERIVED BELI</th>
</tr>
</thead>
<tbody>
<tr>
<td>888777901</td>
<td>ADAMS, JOHN</td>
<td>1020.00</td>
<td>ACTIVE</td>
<td>02/01/01</td>
<td>H/M</td>
<td>U/E</td>
<td>5/1</td>
</tr>
<tr>
<td>674321887</td>
<td>HENRY, PATRICK</td>
<td>1000.00</td>
<td>ACTIVE</td>
<td>04/01/01</td>
<td>H/M</td>
<td>U/E</td>
<td>4/1</td>
</tr>
<tr>
<td>321987444</td>
<td>JEFFERSON, THOMAS</td>
<td>1007.00</td>
<td>INACTIVE</td>
<td>03/01/01</td>
<td>H/M</td>
<td>U/E</td>
<td>5/1</td>
</tr>
<tr>
<td>321444333</td>
<td>ROSS, BETSY</td>
<td>1008.00</td>
<td>ACTIVE</td>
<td>02/01/01</td>
<td>H/M</td>
<td>U/E</td>
<td>3/1</td>
</tr>
<tr>
<td>332112121</td>
<td>WASHINGTON, MARTHA</td>
<td>1019.00</td>
<td>ACTIVE</td>
<td>03/17/00</td>
<td>H/M</td>
<td>U/E</td>
<td>4/1</td>
</tr>
</tbody>
</table>

**TOTAL EMPLOYEES FOR DEPARTMENT:** 5
### Employees Approaching 1000 Eligible Hours

**Department:** 345608 Department of English

<table>
<thead>
<tr>
<th>EMP ID</th>
<th>NAME</th>
<th>HRS TOWARD</th>
<th>EMP ELIGIBILITY</th>
<th>HIRE DATE</th>
<th>RETIREMENT/FICA CODES</th>
<th>ASSIGNED BELI</th>
<th>DERIVED BELI</th>
</tr>
</thead>
<tbody>
<tr>
<td>88877902</td>
<td>DOUGLAS, FREDERICK</td>
<td>999.00</td>
<td>ACTIVE</td>
<td>02/01/01</td>
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<td>5</td>
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<tr>
<td>674321888</td>
<td>GRANT, ULYSSES</td>
<td>885.00</td>
<td>ACTIVE</td>
<td>04/01/01</td>
<td>H/M</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>321987445</td>
<td>LEE, ROBERT E</td>
<td>976.00</td>
<td>INACTIVE</td>
<td>03/01/01</td>
<td>N/M</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>321444334</td>
<td>LINCOLN, ABRAHAM</td>
<td>917.00</td>
<td>ACTIVE</td>
<td>02/01/01</td>
<td>H/M</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>332112123</td>
<td>TRUTH, SOJOURNER</td>
<td>950.00</td>
<td>LV W/O</td>
<td>03/17/00</td>
<td>H/M</td>
<td>4</td>
<td>4</td>
</tr>
</tbody>
</table>

**Total Employees for Department:** 5