This release addresses the following service request:

**Service Request 14845**

Service Request 14845 asks that modifications be made to the 2000 W-2 Reporting Process.

It is asked that the following changes be made to the W-2 process:

- **W-2 Laser Form:**
  
The year displayed on the W-2 Laser Form should be changed to the reporting year of 2000.

- **W-2 Extract Edit**

  An existing edit checks an employee’s Year-to-Date Earned Income Credit (EDB 6099Y). If the employees Year-to-Date Earned Income Credit (EIC) is greater than the maximum EIC allowed, message 60-128 is displayed, and the maximum EIC amount is written to the employee’s W-2 record. For the reporting year of 2000, the maximum amount of EIC allowed is $1412.00. Therefore, the edit should be changed to compare the employee’s Year-to-Date EIC amount to the maximum EIC amount of $1412.00.
• System Messages Changes

The severity level of existing message 60-125 “X-coded alien has one or more reportable amounts” should be changed from ‘7’ (Employee Reject) to ‘3’ (Warning).

The existing message 60-128 “EIC over the maximum of $1387, reduced to $1387” has been changed to “EIC over the maximum of $1412, reduced to $1412”.

Programs

PPTAXEDB

The edit on the Earned Income Credit Amount has been changed to check for a maximum Earned Income Credit Amount of $1412.00.

The logic that sets the exception flag on the W-2 Extract File for those ‘X’ Alien employees (Citizenship Code = ‘X’) who have reportable income have been commented out. The severity level associated with message 60-125 “X-coded alien has one or more reportable amounts” has been downgraded from ‘7’ (Employee Reject) to ‘3’ (Warning).

PPTAXW2R

Since an ‘X’ Alien employee one or more reportable amounts is no longer considered an exception, the logic which issues the exception message has been removed.

Form Changes

The format of the W-2 Laser form has not changed. However, the year displayed on the W-2 Laser form has been changed to 2000.

Table Updates

System Messages Table

The maximum Earned Income Credit (EIC) amount referenced in the text of existing message 60-128 has been changed to $1412.

The severity level for existing message 60-125 has been downgraded to a severity level of ‘3’ (Warning).

The update transactions in PAYDIST.R1318.CARDLIB(MSGPROD), and the completed facsimile form UPAY554 sent with this release, are supplied for both Test and Production.

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

1. Program Preparation

Note: At UCOP, all COBOL programs pass through the DB2 pre-compiler, whether or not the program contains embedded SQL, to resolve INCLUDE references. Your site may have different requirements.
Note: "DUAL" programs must be compiled twice and linked into batch and online libraries ("LOADLIB" and "OLOADLIB" respectively). DUAL-ONLINE programs must be compiled once only and linked into the online library. "CICS" programs must be CICS pre-compiled and compiled once and linked into OLOADLIB. "BATCH" programs must be compiled once and linked into the batch LOADLIB only.

a) Install, compile, and link the modified program listed in Table 1

<table>
<thead>
<tr>
<th>Program Name</th>
<th>DB2?</th>
<th>Compile</th>
<th>Package</th>
<th>Bind?</th>
<th>Done?</th>
</tr>
</thead>
<tbody>
<tr>
<td>PPTAXEDB</td>
<td>Yes</td>
<td>BATCH</td>
<td></td>
<td></td>
<td>No</td>
</tr>
<tr>
<td>PPTAXW2R</td>
<td>No</td>
<td>BATCH</td>
<td></td>
<td></td>
<td>No</td>
</tr>
</tbody>
</table>

Table 1

2. Bind the Plan listed in Table 2:

<table>
<thead>
<tr>
<th>Plan Name</th>
<th>Done?</th>
</tr>
</thead>
<tbody>
<tr>
<td>PPP600</td>
<td></td>
</tr>
</tbody>
</table>

Table 2

3. Testing

Perform installation verification testing as described in the Test Plan.

Perform any desired additional campus testing.

4. Install all the objects into Production.

5. Control Table Updates

Run PPP010 to update the VSAM System Messages Table. Either key from the provided facsimile UPAY554 form, or use the transactions in CARDLIB(MSGPROD).

Run PPP851 to update the production DB2 System Messages Table.

6. W-2 Laser Form

At UCOP, the Overlay Generation Language (OGL) software is only installed on the VM side. Thus, the W-2 form used for testing at UCOP was assembled using the Overlay Generation Language on the VM side. The Assembled OGL was transmitted to the MVS side, and the Print Services Facility (PSF) was used to assemble the FormDefs and PageDefs. Your campus may have different procedures.

The W-2 2000 FormDefs (*F1W22000*) and W-2 2000 PageDefs (*P1W22000*) are in the PAYDIST.R1318.FDEFPDEF library.

The source pre-assembled OGL commands (*W22000*) are in the PAYDIST.R1318.OGLLIB library.
Timing of Installation

The installation of this release is date-mandated.

Installation of this release is urgent in that it must be tested and ready to meet prescribed tax reporting deadlines.

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 Jackson.Quan@ucop.edu, or call at (510) 987-0464.

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