Service Request 15261

Service Request 15261 specified changes to the Payroll/Personnel System (PPS) in support of new rules for eligibility in the University of California Retirement Plan (UCRP) and health and welfare benefits. A major component of the specified changes was the capture and recording of time worked in eligible appointments. These changes were provided to campuses on November 15, 2000 as Payroll Release 1313.

It has subsequently been determined that hours worked in certain academic titles reserved for student employees are being incorrectly included in the Hours Towards Benefits Eligibility totals. These requirements ask that the logic be modified to exclude hours worked in academic student titles from the totals used to determine retirement and benefits eligibility.

Error Report 1756

Service Request 15210 requested modifications to Retirement and FICA Code derivation for casual employees achieving sufficient hours toward benefits eligibility. A new value of 'R' was introduced for the Retirement/FICA Derivation Indicator to indicate a rehired annuitant who waived their right to re-entry into the UCRP retirement system. These modifications were issued in release 1313.

The 'R' value program logic in most cases paralleled logic for value 'N'. Specifically, during a Rehire action it was necessary to explicitly re-enter the value 'N' or 'R' during the Rehire to block re-derivation of Retirement and FICA Codes. In the case of value 'N', when re-derivation occurred, the value was changed to 'Y'. This was not occurring with the value 'R', leading to a condition in which the value remained 'R' but re-derivation occurred.
It was requested that the code be modified to block re-derivation when the value is 'R' regardless of whether it is explicitly entered during the Rehire.

**Programs**

**PPFICRET**
PPFICRET is called during EDB maintenance to derive Retirement Code and FICA Codes.

PPFICRET has been modified to block derivation when the Retirement/FICA Derivation Indicator is 'R', regardless of whether it was explicitly entered during the Rehire action. In addition, the Retirement/FICA Indicator value 'R' is changed to '4' for a future pending rehire, similar to logic for the other three possible values 'Y' to '1', 'L' to '2', and 'N' to '3'. The values '1', '2', '3' and '4' are system derived and cannot be entered. Therefore the new value does not need to be added to value edits on the Data Element Table.

**PPGRSPAR**
PPGRSPAR is called by PPP390 during the EDB Compute process. One of its functions is to evaluate appointments to determine if the hours on pay transactions should be included in the Hours Toward Benefits Eligibility. This logic has been modified to exclude hours associated with student academic titles. These titles are identified by a value of '0' (zero) in the Retirement Code 1 field on the Title Code Table.

**Table Updates**

**CICS Help**
The online Help text for Retirement/FICA Derivation Indicator has been modified to include the code interpretation for value '4'.

**Installation Instructions**

1. Modify programs PPFICRET and PPGRSPAR
2. DB2-precompile, compile and link the modified Dual-Use program PPFICRET and Batch program PPGRSPAR into the Batch loadlib.
3. DB2-precompile, compile and link the modified Dual-Use program PPFICRET into the online loadlib.
4. Import the modified CICS helptext for Retirement/FICA Derivation Indicator (DE 0238) from file HELPDDSE.
5. Perform the installation Test Plan.
6. Perform any desired additional campus testing.
7. Install modified programs PPFICRET and PPGRSPAR in production.
8. Install the CICS helptext in production.

**Timing of Installation**

The installation of this release is Not Urgent.

However, until it is installed Hours Toward Benefits Eligibility will continue to be accumulated inappropriately for some Title Codes. If the Total Hours Toward Benefits Eligibility reach the reporting threshold they will appear on the PPP1381 report, thus requiring investigation. If the employee is defined solely with such restricted Title Codes automatic enrollment in benefits will not occur. Program PPFICRET already properly blocks that process. However, if the employee also has an appointment eligible for benefits enrollment, the hours accumulated under the ineligible appointment might be sufficient to inappropriately trigger enrollment.

Also until installation, Rehire actions involving a Retirement/FICA Derivation Indicator value of 'R" need to be monitored to ensure the desired results in terms of derived Retirement Code and FICA Code.
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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