Service Request 80099

Release 1294 modified the Base Payroll/Personnel System (PPS) to provide a “Multi-Unit Link” that tied together exclusively represented units which are represented by a single Union. Currently, the “Multi-Unit Link” value is used to identify a group of related units that allow the total monthly deductions of all related units to be applied against the maximum monthly cap defined for the units. This modification was to meet a need defined by the UPTE (University Professional and Technical Employees) union which enabled their represented employees to hold multiple appointments in two or more of their units without being assessed Agency Fees or Union Dues in a duplicative manner.

It is proposed that the Base Payroll/Personnel System (PPS) be modified to provide a mechanism which will expand on the notion of tying multiple units, in this case the three UPTE (RX, TX, and HX) units, together to include the purpose of dues collection. Thus when an employee signs up to become a member of the UPTE union their dues should follow any title code change they might make from either one UPTE unit to another, or to an unrepresented position.

It is not proposed at this time to change any of the logic that provides a discontinuance of dues when an employee moves to another exclusively represented unit such as SX which is represented by the AFSCME (American Federation of State, County and Municipal Employees) union or BX which is represented by the UAW (United Auto Workers) union.
At the present time, UPTE and AFT (American Federation of Teachers) are the two unions requesting the movement of dues deductions when an employee changes title. Other unions may also express an interest in participating in the dues movement in the future. Therefore, the mechanism used for the dues movement should also work for any union requesting to participate in the dues movement.

**Error Report 1799**

Error Report 1799 addresses two problems found in module PPEI505. They are as follows:

- Copymember CPPDXE99, which is the standard SQL Error Exit routine, is missing in the Procedure Division. Thus, when a negative SLQ error is detected from DB2, section 999999-SQL-ERROR is not executed. Copymember CPPDXE99 has been coded in the Procedure Division section. In addition, the switch associated with field “KRMI-RETURN-WITH-SQLCODE” is set to on in section 999999-SQL-ERROR.

- PPBRSC is not initially called to call PPBUTUT2 to load the collective bargaining data into a table, causing the first non-zero balance amount in the EDSA Array to be rejected as an invalid deduction. PPBRSC has been modified to signal PPBRSC to call PPBUTUT2 to load the collective bargaining data to the internal working storage table.

**Programs**

**PPCB02**

This module has been modified such that message 01-954 is issued when a blank Agency Fee Base is present for a represented (‘C’) unit. That is, the edit for a blank Agency Fee Base applies only to a represented unit.

**PPCTBUFE**

This module has been modified to include the values ‘F’ and ‘G’ to the list of valid values for the Organization BUC Link. In addition, edits have been added to edit the data for unrepresented units (‘U’) when the transaction is an add type transaction.

**PPCTC03**

This module has been modified such that message 01-954 is issued when a blank Agency Fee Base is present for a represented (‘C’) unit. That is, the edit for a blank Agency Fee Base applies only to a represented unit.

**PPDUEUTL**

This module has been modified such that a conditional statement (BUF_REP <> ‘U’) has been included in the WHERE clause of the DB2 SELECT statement in section 80000-SELECT-BUT-BUF to exclude BUF records that are unrepresented.

**PPEG205 (new)**

This new module has been developed to move an employee’s existing dues deduction from one unit to another unit within the same organization when the employee changes title. It is noted that if an employee changes title and that title is associated with a “99” TUC, an unrepresented G-Balance is not set up unless all appointment TUCs within the same organization have already ended.

Note that this new module only moves an employee’s existing dues deduction to another unit. It does not contain logic to de-enroll an employee from any existing dues deductions because of collective bargaining ineligibility nor
does it de-enroll an employee from Agency Fee deduction when both dues deduction and Agency Fee deduction are present. Existing module PPEI505 will continue to determine whether an employee is eligible for collective bargaining benefits. Existing module PPEG201 will continue to de-enroll an employee from Agency Fee deduction when both dues deduction and Agency Fee are present for the same bargaining unit.

**PPEI505**

This existing module has been modified to correct the two problems addressed in Error Report 1799.

**PPEM505 (new)**

Similar to the module PPEG205, this new module has been developed for the monthly maintenance process to move an employee’s existing dues deduction from one unit to another unit within the same organization when the employee changes title and the appointment becomes active in the current month. It is noted that if an employee changes title and that title is associated with a ‘99’ TUC, an unrepresented G-Balance is not set up unless all appointment TUCs within the same organization have already ended.

Note that this new module only moves an employee’s existing dues deduction to another unit. It does not contain logic to de-enroll an employee from any existing dues deductions because of collective bargaining ineligibility nor does it de-enroll an employee from Agency Fee deduction when both dues deduction and Agency Fee deduction are present. Existing module PPEI505 will continue to determine whether an employee is eligible for collective bargaining benefits. Existing module PPEM201 will continue to de-enroll an employee from Agency Fee deduction when both dues deduction and Agency Fee are present for the same bargaining unit.

**Copymembers**

**CPWSXIC2**

This copymember contains campus-specific Payroll values.

This copymember has been modified to add the appropriate Bargaining Units that are participating in the dues deduction movement. In addition, a new field for the Bargaining Unit Organization Link value has been added to the record structure of the existing IDC-UNION-GTN Array for unrepresented dues deductions.

**Bind Members**

**PPP080, PPP120**

These bind statements have been modified with the addition of DBRM member PPEG205.

**PPP130**

These bind statements have been modified with the addition of DBRM member PPEM205.

**PPEG205 (new)**

This is the package bind statement for EDB update module PPEG205.

**Table Updates**

**Bargaining Unit Agency Fee Table**
Currently, the data contained on this table defines associations between Bargaining Units and related Union, Agency Fee and Charitable deductions. Note that prior to this release table PPPBUF contains data for only represented ('C') bargaining units.

This table is modified such that the UDUE GTN Number 370 for unrepresented bargaining units HX, TX, and RX are defined on the PPPBUF table. For these units, the associated Agency Fee GTN value and the Charity GTN value contain zeroes, and the rest of the fields are left blank. The Bargaining Unit Organization Link information contains a value of ‘F’ for both the represented ('C') and unrepresented ('U') bargaining units HX, TX, and RX related to the UPTE (University Professional and Technical Employees) organization.

In addition, the UDUE GTN Number 075 for unrepresented bargaining units IX and LX are defined on the PPPBUF table. For these units, the associated Agency Fee GTN value and the Charity GTN value contain zeroes, and the rest of the fields are left blank. The Bargaining Unit Organization Link information contains a value of ‘G’ for both the represented ('C') and unrepresented ('U') bargaining units IX and LX related to the AFT (American Federation of Teachers) organization.

**Bargaining Unit Table**

Currently, GTN 370 related to the unrepresented dues deduction for the UPTE Organization is defined on the table for the unrepresented HX and RX units only.

Since the TX unit is also related to the UPTE Organization, but GTN 370 is not defined for the unrepresented TX unit, unrepresented dues deduction GTN 370 has been defined on the Bargaining Unit table for the unrepresented TX unit.

**System Messages Table**

Messages have been added related to the editing of the unrepresented units for the Bargaining Unit Agency Fee Table.

**Processing Group Table**

New module PPEG205 has been added to the Program IDs 08 and 12, and new module PPEM205 has been added to Program ID 13.

**Con-edit Process (Program ID 08)**

Module PPEG205 is called to perform the appropriate movement of the employee’s dues deduction based on the following triggers:

- GTN Con-edit Trigger 202 (Explicit maintenance activity for Employee Relations Code and selected appointment elements)

Initiation of PPEG205 occurs before all re-derivation simulations of collective bargaining related EDB elements.

**Implied Maintenance (Program ID 12)**

Module PPEG205 is called to perform Agency Fee implied maintenance functions based on the following trigger:

- GTN Con-edit Trigger 202 (Explicit maintenance activity for Employee Relations Code and selected appointment elements)
Initiation of PPEG205 occurs before all re-derivation of collective bargaining related EDB elements.

**Monthly Maintenance (Program ID 13)**

Module PPEM205 is called unconditionally to perform appropriate movement of dues deductions before all re-derivation of collective bargaining related EDB elements.

**Routine Definition Table**

New module PPEG205 for the **File Maintenance** process has been added to the table.

New module PPEM205 for the **Periodic Monthly Maintenance** process has been added to the table.

**Test Plan**

An installation Test Plan is provided with this release.

**Installation Instructions**

An Installation Instructions document is provided with this release.

**Timing of Installation**

The installation of this release is **Date-Mandated**. This release may be installed earlier but not later than September 16, 2002. Thus, the installation of the changes in this release allows the system to automatically move an employee’s existing dues deduction from one unit to another unit (within the same organization) when a title change has occurred for the UPTE and AFT organizations.

If there are any questions, please send electronic mail to Jackson Quan@ucop.edu, or call at (510) 987-0464.

Jackson Quan

cc: Jerry Wilcox