

Service Request 80959
BELI Derivation and Student Appointments
Final 8/3/2004

Background

Currently the BELI derivation process includes student appointments in the determination of whether the total of appointments equal 50% or more for a year or more. For example, a one-year 25% casual/restricted appointment and a one-year 25% limited appointment for the same one-year period would result in a Derived BELI value of '2' (mid-level benefits).

This handling of student appointments was consistent at one time with the handling of student appointments for retirement derivation purposes. However, changes to the retirement derivation were specified in Service Request 80443 (provided to campuses in release 1483 on April 3, 2003) such that student appointments are no longer considered in the determination of duration and percent time. The same change was not asked for in the BELI derivation process at that time, creating an inconsistency in the two processes.

Human Resources and Benefits has subsequently determined that ineligible student appointments should not be included in the duration and percent calculation used to determine benefits eligibility, and has asked that the Payroll/Personnel System (PPS) be modified to exclude those appointments.

Requested PPS Modification

The BELI derivation process should be modified to exclude student appointments from the calculation of total duration and percent of appointments. For purposes of this derivation, student appointments are identified as follows:

- Appointment Type (EDB 2020) is '4' (casual/restricted), or
- the CTO (Class Title Outline) value on the Title Code Table for the appointment's Title Code (EDB 2006) is in the range 400-499

Student appointments should be considered in the same manner as per diem, by-agreement, and without-salary appointments, which are currently excluded from the calculation of duration and percent.

An explanation and flowchart of the proposed revised BELI derivation process are attached.

Attachment to SR xxxxx
BELI Derivation Logic
Reflecting proposed changes to handling of student appointments
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General Outline

The BELI Derivation process looks at hours toward benefits eligibility, average hours per week, appointment attributes, and retirement status to determine the value for the Derived BELI.

- If the employee qualifies for benefits (including retirement) because of 1000 hours toward benefits eligibility, the Derived BELI is set to '1' in monthly maintenance. The rest of the BELI Derivation process is bypassed.
- If there are no appointments, the Average Hours Per Week determines the BELI value.
- If there are appointments, the process loops through appointments and determines the benefits eligibility based on each individual appointment. If it finds an appointment that satisfies the '12 months or more at 50% or more' criteria, the process will examine the average hours and retirement code value and determine the Derived BELI value. It will not loop through the remaining appointments, since it already has sufficient information to derive a BELI.
- If no single appointment results in a BELI derivation, the process will determine if all appointments are per diem, without salary, by agreement, or student appointments. If so, the Derived BELI will be set to either 6,7,8, or 9.
- If the average hours are less than 17.5, and there is at least one appointment that is not per diem, without salary, by agreement, or a student appointment, a BELI of 5 is assigned.
- If the average hours are 17.5 or greater, and there is at least one appointment that is not per diem, without salary, by agreement, or a student appointment, the process looks at the combined duration and appointment percent of the remaining appointments. If the composite appointments meet the '12 months or more at 50% or more' criteria, the process examines the retirement code to determine whether to assign a '1' or a '2'. If the composite appointments meet the '3 months or more at 100%' the process examines the retirement code to determine whether to assign a '1' or a '3'. If the composite appointments do not meet either duration/percent test, a BELI of 4 is assigned.

Detailed Process

Once the Derived BELI value is determined, all remaining steps are bypassed. Points where the BELI is derived are shown in bold.

The BELI Derivation logic uses four work areas to hold various preliminary BELI values:

- BELI Sub-1 – initially is set based on average hours
 - BELI Sub-2 – holds the 'highest eligibility' value from sub-A as logic goes through the appointments
 - BELI Sub-3 – temporary hold to make determination between BELI values 1, 2, or 3
 - BELI Sub-A – for individual appointments
1. If the employee achieves benefits eligibility because of 1000 hours in monthly maintenance, the Assigned BELI is set to 1. **Set Derived BELI to 1.**
 2. The process moves values into Sub-1 based on average hours.
 - Average hours = zero Sub-1 set to U
 - Average hours < 17.5 Sub-1 set to 5
 - Average hours >= 17.5 Sub-1 set to 4
 3. If there are no appointments, the Derived BELI is set based on average hours:
 - Sub-1 = 'U' **Set Derived BELI to X**
 - Sub-1 = '5' **Set Derived BELI to 5**
 - Sub-1 = '4' **Set Derived BELI to 4**
 4. If there are appointments, the process loops through the appointments.
 - a. The appointment is identified as current, expired, or future.
 - b. Appointments to be excluded from determination of the 12month/50% test are identified and assigned an individual temporary BELI value

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- Without Salary Appointment (WOS Indicator is 'Y') Sub-A set to 9
- By Agreement Appointment (Rate Code is 'B') Sub-A set to 8
- Per Diem Appointment (Appt Type is '6') Sub-A set to 7
- Casual Restricted appointments (Appt Type is '4') Sub-A set to 6
- Title Code is a student title code (CTO is 4xx) Sub-A set to 6

(skip to h)

- c. An appointment that is not excluded is loaded into a table for further processing.
- d. A determination is made whether the individual appointment has a duration of 12 months or more and a percent time of 50% or more.
- e. If the appointment is not a without salary, by agreement, per diem, or student appointment, it is assigned an individual temporary BELI value of 1.
- Not an excluded appointment Sub-A set to 1
- f. If the appointment is not excluded, an attempt is made to assign a derived BELI based on that appointment only.
- 1) If Sub-A is 1, and sub-1 is 5, then the employee has at least one eligible appointment, and the average hours are below 17.5. **The Derived BELI is set to '5'**. No further processing is done for this employee.
 - 2) If Sub-A is 1, and sub-1 is 'U' or '4', then the employee has at least one eligible appointment and the average hours are 17.5 or above (or the system has not yet derived average hours). If the individual appointment satisfies the 50% or more for 12 months or more test, the Derived BELI will be set based on retirement status.
 - If the employee is not in a retirement plan (retirement code is 'N', 'H', or blank), the **Derived BELI is set to '2'**.
 - If the employee is in a retirement plan, the **Derived BELI is set to '1'**.No further processing is done for this employee.
- h. If the Derived BELI has not been set yet, further tests are done to set a BELI level in Sub-2 which will be passed to the next stage of the derivation process:
- 1) If the appointment is a current appointment, the value in Sub-A is compared to the value of other appointments that have made it to this part of the logic. If it is lowest value so far, Sub-A is moved to Sub-2. *Note that Sub-2 is initialized to '99', so the first appointment to reach this logic will always result in resetting Sub-2 to Sub-A.*¹
5. After all appointments are processed, the value of Sub-2 is examined to see the 'highest eligibility level' returned by any of the appointments.
- If Sub-2 = '6' **Set Derived BELI to 6**
 - If Sub-2 = '7' **Set Derived BELI to 7**
 - If Sub-2 = '8' **Set Derived BELI to 8**
 - If Sub-2 = '9' **Set Derived BELI to 9**
 - If Sub-2 is less than '6', continue.
6. Note that if we get here, the average hours are either not yet determined (zero), or they are equal to or greater than 17.5.
- If the composite of all the included appointments satisfies the criteria for '12 months or more at 50% or more'
 - If the employee is in a retirement plan **Set Derived BELI to 1**
 - If the employee is not in a retirement plan **Set Derived BELI to 2**
 - If the composite of all the included appointments satisfies the criteria for '3 months or more at 100%'

¹ See example on Page 4.

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- If the employee is in a retirement plan **Set Derived BELI to 1**
 - If the employee is not in a retirement plan **Set Derived BELI to 3**

- if the composite of all the included appointments does not satisfy either of the duration/percent tests
 - If the average hours are zero **Set Derived BELI to U**
 - If the average hours are 17.5 or greater **Set Derived BELI to 4**

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Footnote 1 Example:

An employee with 18.0 Average Hours Per Week has the following appointments:

- 10 By Agreement (Sub-A = 8)
- 20 20% casual/restricted (Sub-A = 6)
- 30 28% per diem appointment (Sub-A = 7)

The system first sets the value of Sub-2 to '99'.

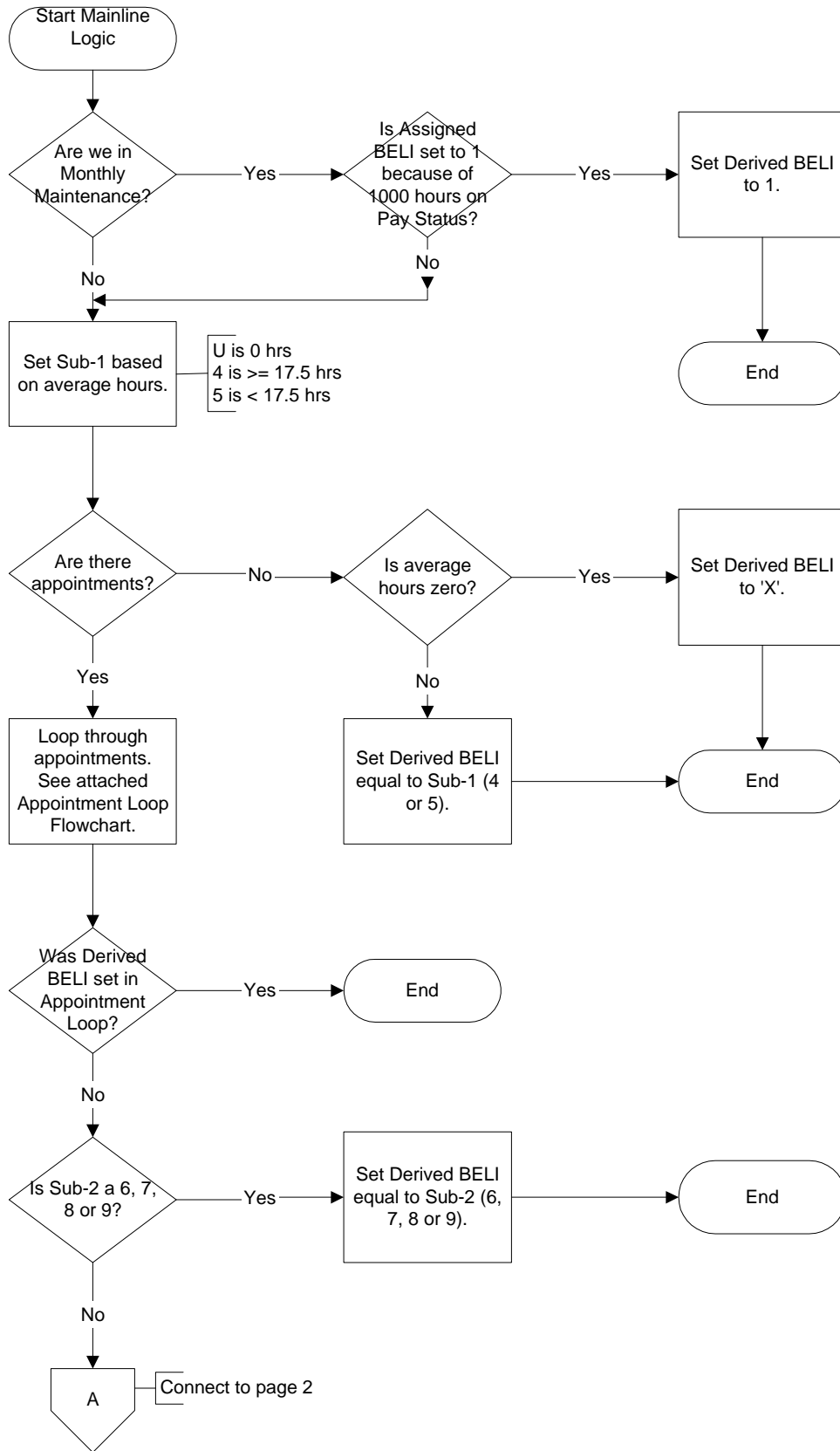
When appointment 10 is processed, Sub-2 is set to 8 because 8 is less than 99.

When appointment 20 is processed, Sub-2 is set to 6 because 6 is less than 8.

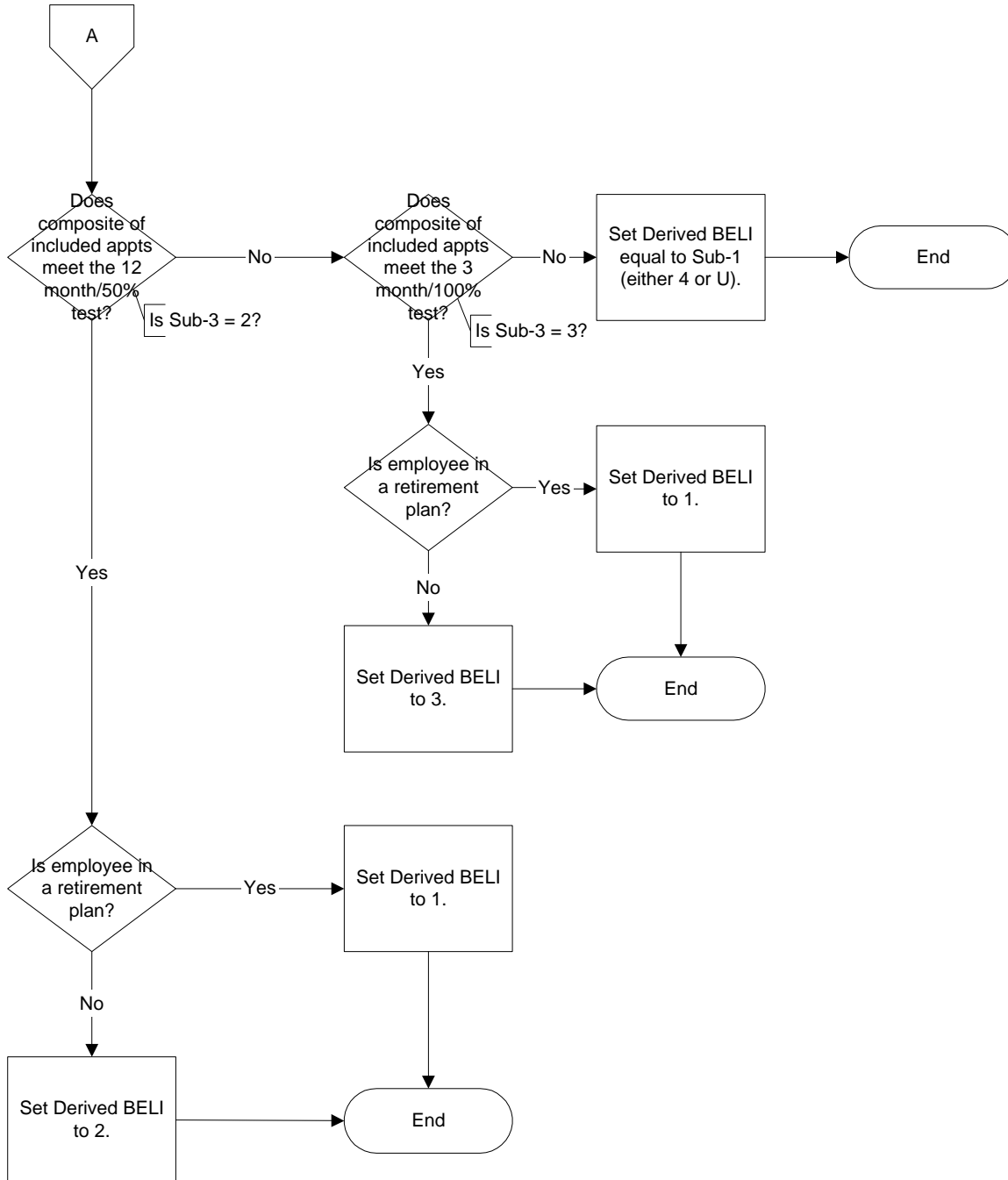
When appointment 30 is processed, Sub-2 remains at 6 because 6 is less than 7.

Note that even though 6,7,8,9 confer the same eligibility level, the system uses the lowest numerical value...so if an employee has two appointments, one by agreement (BELI 8) and one casual/restricted (BELI 6), a '6' would be returned because 6 is numerically lower than 8.

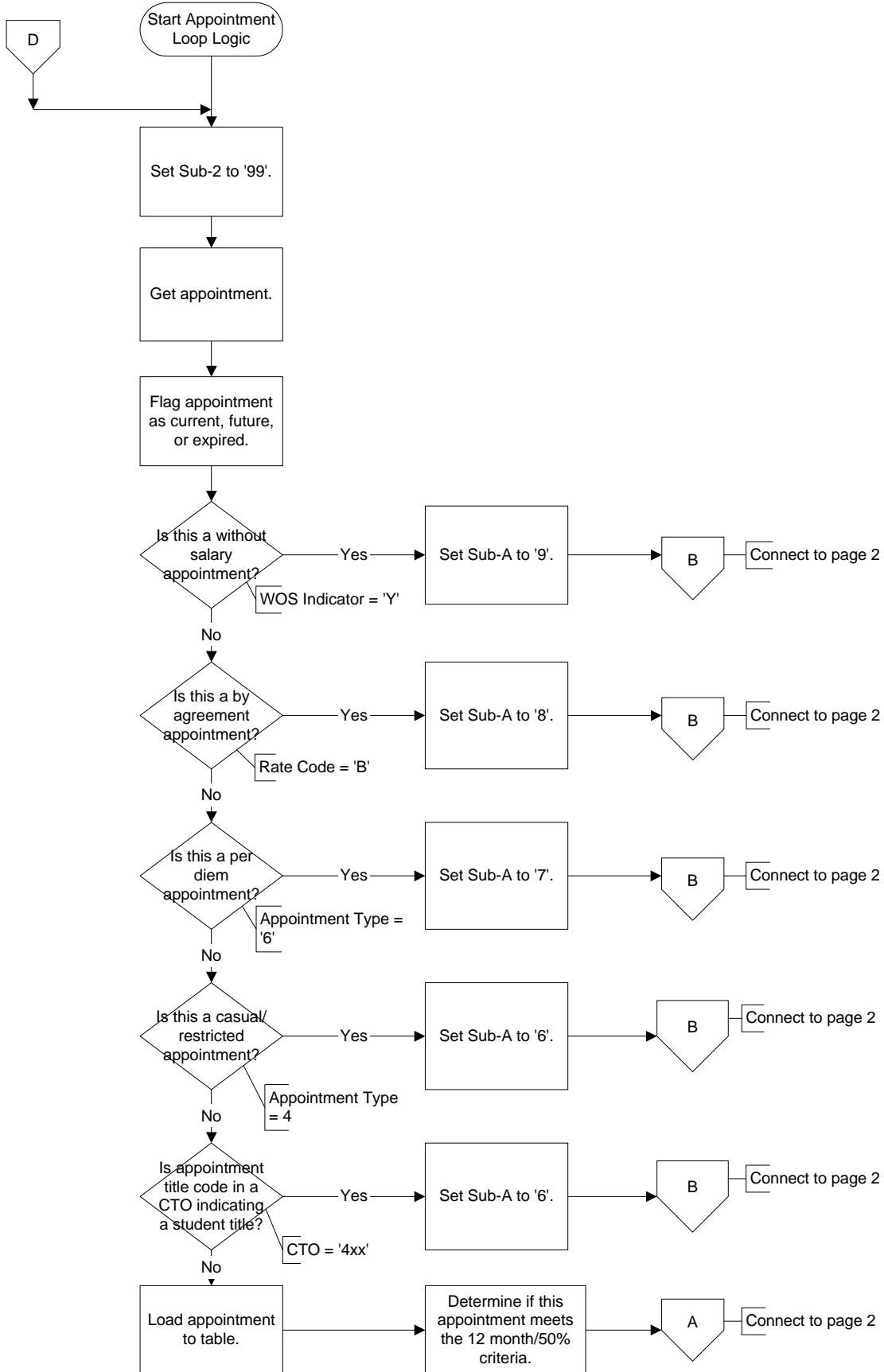
BELI Derivation Mainline Logic - Reflecting Proposed Changes for Student Appointments



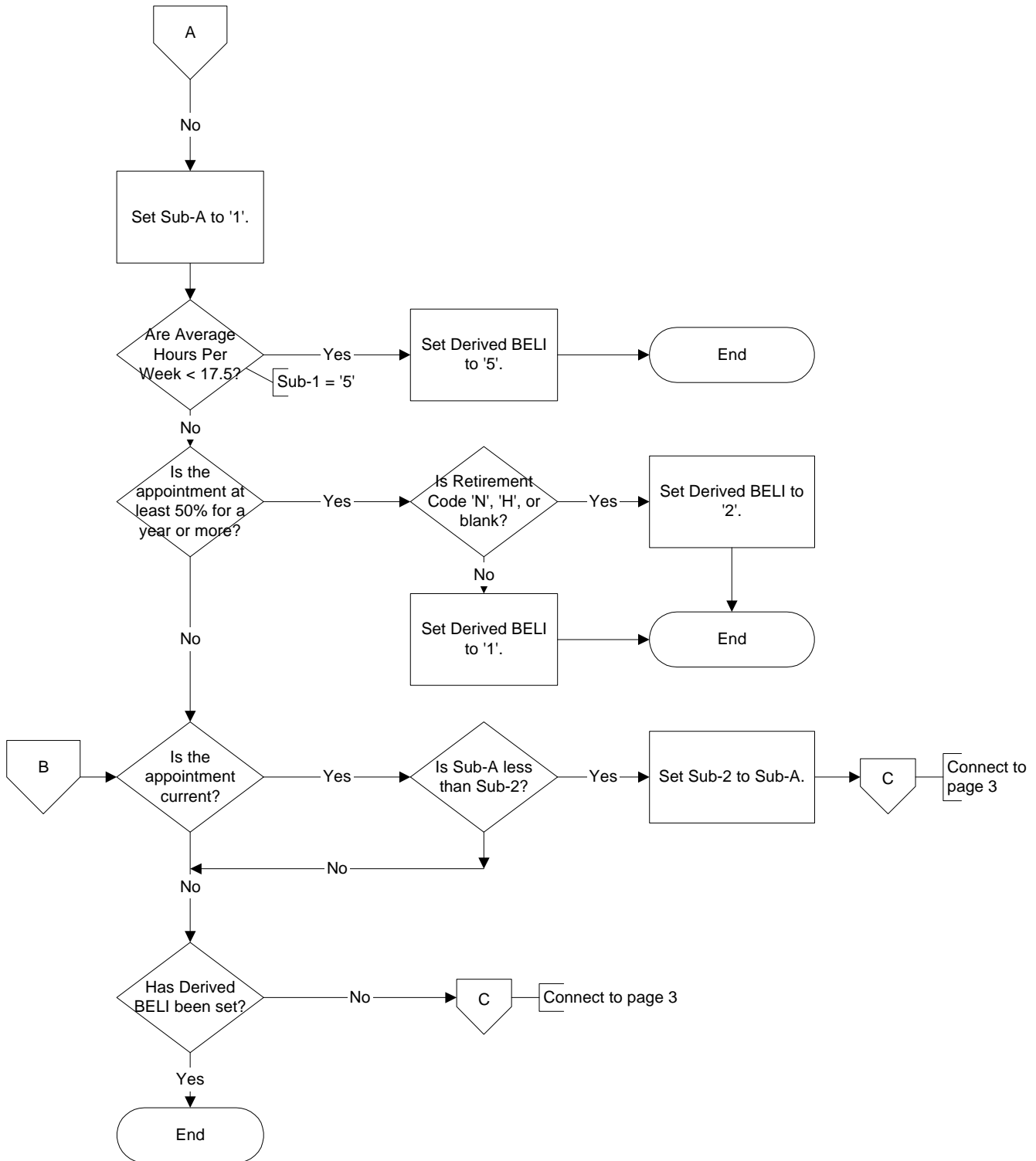
BELI Derivation Mainline Logic - Reflecting Proposed Changes for Student Appointments



Appointment Loop Logic - Reflecting Proposed Changes for Student Appointments



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