Release 1605
Detailed Design

BELI Derivation – Student Appointments
Service Request 80959

BELI Derivation – Postdoc Appointments
Service Request 16935

EDB File Maintenance - Postdoc Related Edits
Service Request 16933

One-time Postdoc DOS Edits
Service Request 16937

Table of Contents

Page 1   Final
BELI Derivation – Student Appointments
BELI Derivation – Postdoc Appointments
EDB File Maintenance – Postdoc DOS Edits
One-time Postdoc Related Edits
November 1, 2004

Introduction

Service Request 80959

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.

Service Request 16933

In May 2003, President Richard Atkinson (Emeritus) announced Academic Personnel Policy 390-Postdoctoral Scholars (Postdoc). This policy applies to the Postdoc-Employee, the Postdoc-Fellow and Trainee paid through University accounts, and the Postdoc-Fellows and Trainees, funded from fellowships or trainee-ships, paid directly to the individual. The new policy provides for consistent treatment for both the Postdoc-Employee and the Postdoc-Fellow or Trainee.

In response to Academic Personnel Policy 390-Postdoctoral Scholars (Postdoc), representatives from the University of California, Office of the President (UCOP)-Academic Advancement, UCOP Human Resources and Benefits (HR/B), and UCOP Financial Management have met and discussed with campus Graduate Division representatives at various intervals the topics relating to the administration of Postdoctoral Scholar Benefits Plan (PSBP). The

Page 2   Final
BELI Derivation – Student Appointments
BELI Derivation – Postdoc Appointments
EDB File Maintenance – Postdoc DOS Edits
One-time Postdoc Related Edits
November 1, 2004

document addresses the modifications needed in the Payroll/Personnel System (PPS) to accommodate the special coding needed for PSBP as it encompasses and affects the Postdoc-Employee (TC 3252), the Postdoc-Fellow (TC 3253), and the Postdoc-Paid Direct (TC 3254).

In order to incorporate Postdocs into the EDB as a unique group, new values should be added to the Benefits Eligibility Level Indicator (BELI), Description of Service Table, and Gross-to-Net Table. New health and welfare plan codes should be added to distinguish the PSBP from the existing University H&W plans. [A separate document will be prepared to describe the required changes needed in order to add the new benefit plans and the new BELI value "P-Postdoctoral Scholar Eligibility."]

The payroll computation process should be modified so that Postdoc-Fellows (TC 3253) and Postdoc-Paid Directs (TC 3254) can have their PSBP premiums processed through a payroll compute cycle. The fellowship/scholarship payments made to Non-Resident Aliens should be recorded in a separate gross field for reporting at year-end. Additionally, the Postdoc should be included in the Enrollment File process and the new PSBP plans should be added to the Self-Billing and Consolidated Billing processes.

The Distribution of Payroll Expense process should be modified so that it can identify and record the Postdoc benefits by unique Object Codes. Further, other reporting processes, such as the Corporate Personnel System and the Corporate Financial System, should be modified to identify Postdoctoral appointees. Modifications to the Form W-2 and Form 1042-S processes will be discussed in separate documents.

Thus, this service request concerns changes in EDB File Maintenance, Compute, Carrier File Reporting, Consolidated Billing, and Expense Distribution (See Service Request 16933 for the details).

Due to the complexity of the changes and their interrelationship to each other, the above changes will be released in phases. The first phase of the changes will contain EDB File Maintenance modifications to edit Postdoc appointments and distributions.

Service Request 16935

This Service Request specifies the modifications to the Payroll/Personnel System (PPS) required to provide health and welfare benefits to postdoctoral scholars. These requirements are a complement to Service Request 16933, which provides the requirements for all other aspects of the Postdoc project.

Postdocs are eligible for the following benefits:

- Medical
- Dental
- Vision
- Supplemental Disability
- UC-paid Postdoc Life Insurance (which includes AD&D)
- UC-paid Postdoc Disability

Below is a summary of changes for Postdoc related titles.

1. New values for the Assigned BELI, Derived BELI, and the Medical, Dental, and Vision Plan Codes will be defined.
2. New GTN numbers will be assigned for the postdoc plans.
3. The Benefits Rates Table will carry the rates for the medical, dental, and vision postdoc plans.

Page 3   Final
BELI Derivation – Student Appointments
BELI Derivation – Postdoc Appointments
EDB File Maintenance – Postdoc DOS Edits
One-time Postdoc Related Edits
November 1, 2004

4. The Supplemental Disability plan (Postdoc-paid) will be carried as a GTN deduction. The premium will be determined by the vendor. No salary base shall be stored on the EDB.
5. The BELI Derivation process will be modified to derive a new value of 'P' to indicate eligibility for postdoc plans.
6. The PIE derivation process will be modified to derive a PIE when a BELI of 'P' is assigned.
7. The process which provides default coverage when the employee does not make an enrollment within the PIE will be modified to not perform default enrollments when the BELI is 'P'.
8. Edits will be developed in the EDB Maintenance process to prohibit postdocs from enrolling in non-postdoc medical, dental, and vision plans, and to prevent non-postdoc employees from enrolling in postdoc medical, dental, and vision plans.
9. Edits will be developed in the EDB Maintenance process to prohibit postdocs from enrolling in the Legal Plan, Supplemental Life, Supplemental Disability, employee AD&D, HCRA, and DepCare.
10. Logic will be developed in the EDB Maintenance process to appropriately end date postdoc medical, dental, and vision plans upon separation or change of Assigned BELI from 'P' to another value.

Due to the complexity of the changes and their interrelationship to each other, the above changes will be released in phases. The first release will address the BELI Derivation for Postdoc Titles.

BELI Derivation for Postdoc Titles

The BELI derivation process should be modified to support the new value of 'P'.

If there are one or more active appointments with a Title Code (EDB 2006) value of 3252, 3253, or 3254, and the duration and percent of those appointments total 50% or more for a year or more, or 100% for three months or more, the Derived BELI (EDB 0375) should be set to 'P', regardless of the value of the Hours Per Week (EDB 5132).

In other words, falling below 17.5 hours per week should not cause the Derived BELI to be set to '5' as long as there is a qualifying postdoc appointment.

Note that the process that selects appointments for the determination of duration and percent should use the same selection criteria used to determine duration and percent for the regular BELI derivation process, with the additional requirement that the appointments must have a postdoc title code.

Additionally, if the postdoc scholar has another benefits eligible appointment, such as a 50% appointment with a Lecturer title, the Derived BELI should be 'P' as long as the active postdoc appointments meet the duration and percent requirements.

Service Request 16937

To comply with Academic Personnel Policy 390, some campuses have established individuals in the Postdoc-Fellow and Postdoc-Paid Direct title codes that became active on July 1, 2003. At that time, campuses did not have any restrictions on the Description of Service (DOS) codes that could be used with the Postdoctoral Scholar Title Codes. In Service Request 16933, requested modifications to the Payroll/Personnel System (PPS) included the use of specific DOS codes with each of the Postdoc titles.

This set of requirements asks for a one-time program that will assist campuses with the identification of those individuals with Postdoc title codes and incompatible DOS codes, Time Report Codes, zero anticipated Time, Tax Treaty Income Code, and Insurance Reduction indicator fields. This one-time should select all individuals on the

Page 4   Final
BELI Derivation – Student Appointments
BELI Derivation – Postdoc Appointments
EDB File Maintenance – Postdoc DOS Edits
One-time Postdoc Related Edits
November 1, 2004

Employee Data Base with Employment Status Codes not equal to "S" who have a current or future appointment that contains a Postdoc title code (3252, 3253, or 3254).

The following edits are asked:

When an individual has an appointment with the title code 3252, 3253, or 3254, the individual must have an anticipated Appointment Time percent greater than zero

When an individual has an appointment with the title code 3252, the distribution cannot have the DOS codes FEN, FEL, PDD, or PDW.

When an individual with the Citizenship Status Code "C, P or R" has an appointment with the title code 3253, the distribution should have FEN, PDD, or PDW in the DOS field.

When an individual with the Citizenship Status Code "A, E, F, N, S, or X" has an appointment with the title code 3253, the distribution should have FEL, PDD, or PDW in the DOS field.

When an individual has an appointment with the title code 3254, the distribution should have PDW in the DOS field.

When the DOS is PDW, the appointment should have a "W" in the Time Reporting Code field.

When an individual with the Citizenship Status Code "A, E, F, N, S, or X" has an appointment with the title code 3253 or title code 3254, the Tax Treaty Income Code must be 15.

The Insurance Reduction Indicator for a Postdoc-Fellow (TC 3253) and a Postdoc-Paid Direct (TC 3254) must be N.

If the individual's record does not meet the above criteria, the one-time should record the individual's data on a file to be distributed to the locally designated office. This file should be made available to the locally designated office as a tab-delimited file.

Campuses should have the ability to produce a paper copy of the file. The one-time program should sort the data on the paper report first by Appointment Department Code, then in alphabetical order by name. The report is not a turn-around document.

Campuses should have the ability to run this one-time program on multiple occasions after the implementation of the PPS modifications for Postdoctoral Scholars so that departments can clean-up the Postdoc data.

Page 5   Final
BELI Derivation – Student Appointments
BELI Derivation – Postdoc Appointments
EDB File Maintenance – Postdoc DOS Edits
One-time Postdoc Related Edits
November 1, 2004

Overview

BELI Derivation Changes related to Student Appointments

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 will 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.

BELI Derivation related to Postdoc Titles

The BELI derivation process will be modified to support the new value of 'P'.

If there are one or more active appointments with a Title Code (EDB 2006) value of 3252, 3253, or 3254, and the duration and percent of those appointments total 50% or more for a year or more, or 100% for three months or more, the Derived BELI (EDB 0375) will be set to 'P', regardless of the value of the Hours Per Week (EDB 5132).

In other words, falling below 17.5 hours per week should not cause the Derived BELI to be set to '5' as long as there is a qualifying postdoc appointment.

Note that the process that selects appointments for the determination of duration and percent will use the same selection criteria used to determine duration and percent for the regular BELI derivation process, with the additional requirement that the appointments must have a postdoc title code.

Additionally, if the employee has another benefits eligible appointment, such as a 50% appointment with a Lecturer title, the Derived BELI will be 'P' as long as the active postdoc appointments meet the duration and percent requirements.

EDB File Maintenance – Edits for Postdoc Titles and Distributions

The EDB File Maintenance process will be modified to include on-going edits related to Postdoc titles and distributions.

One-time Edit for Postdoc Titles and Distributions

This set of requirements asks for a one-time program that will assist campuses with the identification of those individuals with Postdoc title codes and incompatible DOS codes, Time Report Codes, and zero anticipated Time fields. This one-time will select all individuals on the Employee Data Base with Employment Status Codes not equal to "S" who have a current or future appointment that contains a Postdoc title code (3252, 3253, or 3254).

The following edits will be as follows:

Page 6   Final
BELI Derivation – Student Appointments
BELI Derivation – Postdoc Appointments
EDB File Maintenance – Postdoc DOS Edits
One-time Postdoc Related Edits
November 1, 2004

When an individual has an appointment with the title code 3252, 3253, or 3254, the individual must have an anticipated Appointment Time percent greater than zero

When an individual has an appointment with the title code 3252, the distribution cannot have the DOS codes FEN, FEL, PDD, or PDW.

When an individual with the Citizenship Status Code "C, P or R" has an appointment with the title code 3253, the distribution should have FEN, PDD, or PDW in the DOS field.

When an individual with the Citizenship Status Code "A, E, F, N, S, or X" has an appointment with the title code 3253, the distribution should have FEL, PDD, or PDW in the DOS field.

When an individual has an appointment with the title code 3254, the distribution should have PDW in the DOS field.

When the DOS is PDW, the appointment should have a "W" in the Time Reporting Code field.

When an individual with the Citizenship Status Code "A, E, F, N, S, or X" has an appointment with the title code 3253 or title code 3254, the Tax Treaty Income Code must be 15.

The Insurance Reduction Indicator for a Postdoc-Fellow (TC 3253) and a Postdoc-Paid Direct (TC 3254) must be N.

If the individual's record does not meet the above criteria, the one-time should record the individual's data on a file to be distributed to the locally designated office. This file should be made available to the locally designated office as a tab-delimited file.

This file will contain the following data elements:

Description	Data Element
Department Code-Appt/Translation	EDB 2032
Name	EDB 0105
Identification Number (Employee ID)	
Citizenship Code	EDB 0109
Appointment Number	EDB 2001
Time-Appointment (Anticipated)	EDB 2012
Time Report Code	EDB 2017
Title Code	EDB 2006
Distribution Number	EDB 2041
Description of Service Code	EDB 2056
Tax Treaty Code	EDB 1170
Insurance Reduction Code	EDB 0299

Campuses will have the ability to produce a paper copy of the file. The one-time program will sort the data on the paper report first by Appointment Department Code, then in alphabetical order by name. The report is not a turn-around document.

Campuses will have the ability to run this one-time program on multiple occasions after the implementation of the PPS modifications for Postdoctoral Scholars so that departments can clean-up the Postdoc data.

Page 7   Final
BELI Derivation – Student Appointments
BELI Derivation – Postdoc Appointments
EDB File Maintenance – Postdoc DOS Edits
One-time Postdoc Related Edits
November 1, 2004

Copy Members

CPCTJGTI

This copymember defines the input fields for updating the Job Group ID Title Code Table.

A value of 'B' will be added to the existing 88 level defining valid EE06 Category values.

CPWSDOSC

This copymember contains DOS constants.

Postdoc related DOS codes of 'PDW', 'PDD', 'FEN', and 'FEL' will be added to this copymember.

CPWSXIC2

CPWSXIC2 defines various campus specific values.

Postdoc related title code constants for title codes 3252, 3253, and 3254 will be defined in this copymember.

In addition, deduction number of 325 (Employee Paid Supplemental Disability), and deduction number of 635 (Postdoc Supplemental Disability) will be defined.

Page 8   Final
BELI Derivation – Student Appointments
BELI Derivation – Postdoc Appointments
EDB File Maintenance – Postdoc DOS Edits
One-time Postdoc Related Edits
November 1, 2004

Bind Member Changes

PPOT1605

This Bind member will contain bind statements for one-time program PPOT1605.

Page 9   Final
BELI Derivation – Student Appointments
BELI Derivation – Postdoc Appointments
EDB File Maintenance – Postdoc DOS Edits
One-time Postdoc Related Edits
November 1, 2004

One-time Program

PPOT1605

To comply with Academic Personnel Policy 390, some campuses have established individuals in the Postdoc-Fellow and Postdoc-Paid Direct title codes that became active on July 1, 2003. At that time, campuses did not have any restrictions on the Description of Service (DOS) codes that could be used with the Postdoctoral Scholar Title Codes. In Service Request 16933, requested modifications to the Payroll/Personnel System (PPS) included the use of specific DOS codes with each of the Postdoc titles.

This set of requirements asks for a one-time program that will assist campuses with the identification of those individuals with Postdoc title codes and incompatible DOS codes, Time Report Codes, and zero anticipated Time fields. This one-time should select all individuals on the Employee Data Base with Employment Status Codes not equal to "S" who have a current or future appointment that contains a Postdoc title code (3252, 3253, or 3254).

The Postdoc title codes and associated values are as follows:

Title Code	Title	Allowed Description of Service Code	Allowed Time Report Code	Anticipated Percent Time
3252	Postdoc-Employee	REG	A, E, P, R, T, Z	Greater than zero
3253	Postdoc-Fellow, Citizenship Status Code "C, P or R"	FEN, PDD, PDW	A, E, P, R, T, W, Z	Greater than zero
3253	Postdoc-Fellow, Citizenship Status Code "A, E, F, N, , S, or X"	FEL, PDD, PDW	A, E, P, R, T, W, Z	Greater than zero
3254	Postdoc-Paid Direct	PDW	W	Greater than zero

When an individual has an appointment with the title code 3252, 3253, or 3254, the individual must have an anticipated Appointment Time percent greater than zero

When an individual has an appointment with the title code 3252, the distribution cannot have the DOS codes FEN, FEL, PDD, or PDW.

When an individual with the Citizenship Status Code "C, P or R" has an appointment with the title code 3253, the distribution should have FEN, PDD, or PDW in the DOS field.

When an individual with the Citizenship Status Code "A, E, F, N, S, or X" has an appointment with the title code 3253, the distribution should have FEL, PDD, or PDW in the DOS field.

When an individual has an appointment with the title code 3254, the distribution should have PDW in the DOS field.

When the DOS is PDW, the appointment should have a "W" in the Time Reporting Code field.

When an individual with the Citizenship Status Code "A, E, F, N, S, or X" has an appointment with the title code 3253 or title code 3254, the Tax Treaty Income Code must be 15.

Page 10   Final
BELI Derivation – Student Appointments
BELI Derivation – Postdoc Appointments
EDB File Maintenance – Postdoc DOS Edits
One-time Postdoc Related Edits
November 1, 2004

The Insurance Reduction Indicator for a Postdoc-Fellow (TC 3253) and a Postdoc-Paid Direct (TC 3254) must be N.

If the individual's record does not meet the above criteria, the one-time should record the individual's data on a file to be distributed to the locally designated office. This file should be made available to the locally designated office as a tab-delimited file.
Campuses will have the ability to produce a paper copy of the file. The one-time program will be sorted the data on the paper report first by Appointment Department Code, then in alphabetical order by name. Note that the report is not a turn-around document.

Campuses will have the ability to run this one-time program on ***multiple occasions*** after the implementation of the PPS modifications for Postdoctoral Scholars so that departments can clean-up the Postdoc data.

Page 11 Final
BELI Derivation – Student Appointments
BELI Derivation – Postdoc Appointments
EDB File Maintenance – Postdoc DOS Edits
One-time Postdoc Related Edits
November 1, 2004

New Programs

PPEC025

The following edits will be performed in this module:

- If title code is 3253 (Postdoc-Fellow) or 3254 (Postdoc-Paid Direct), the DOS Code associated with the Distribution should be PDW, PDD, FEN, or FEL.

  If title code is 3253 (Postdoc-Fellow) or 3254 (Postdoc-Paid Direct), and the DOS Code is not PDW, PDD, FEN, or FEL, message "Invalid DOS Code for Postdoc Fellow or Paid Direct." will be issued with the severity of Employee Reject in on-line and batch. The remaining edits below will be bypassed.

- If title code is 3254 (Postdoc-Paid Direct), the DOS Code associated with the Distribution should be PDW (PDS-WOS-Not UC Paid).

  If title code is 3254 (Postdoc-Paid Direct), and the DOS Code is not PDW, message "Postdoc-Pd Direct must have DOS of PDW" will be issued with the severity of Employee Reject in on-line and batch.

- If title code is 3253 (Postdoc-Fellow) , the DOS Code should be PDW or PDD.

  If title code is 3253 (Postdoc-Fellow) , and the DOS is not PDW or PDD, message "Postdoc-Fellow must have DOS of PDW or PDD" with the severity of Employee Reject in on-line and batch.

- If title code is 3253 (Postdoc-Fellow), the Citizenship Status Code is "C, P, or R", the DOS Code on the distribution should be FEL, message "DOS FEL is for NRA Postdoc only" will be issued with the severity of Employee Reject in on-line and batch.

  For those campuses who are compensating the Postdoc-Fellow (Title Code of 3253), the local campus will be set severity to '0' (Suppress Print).

- When the title code is 3253 and the Citizenship Code Status Code is "A, E, F, N, S, or X", the DOS on the distribution may be FEL or PDD.

- If title code is 3253 (Postdoc-Fellow) and the Citizenship Status Code is "C, P, or R", and the DOS Code on the distribution is FEL, message "DOS FEL is for NRA Postdoc only" will be issued with the severity of Employee Reject.

- If title code is 3253 (Postdoc-Fellow), and the DOS Code is FEN and the Citizenship Status Code is not "C", P, or "R", message "DOS FEN may not be used for NRA Postdoc" will be issued with severity of Employee Reject in on-line and batch.

Page 12   Final
BELI Derivation – Student Appointments
BELI Derivation – Postdoc Appointments
EDB File Maintenance – Postdoc DOS Edits
One-time Postdoc Related Edits
November 1, 2004

- If title code is 3253 (Postdoc-Fellow) or title code is 3254 (Postdoc-Paid Direct) , the DOS Code should be "PDW" with Time Report Code "W".

  If title code is 3253 (Postdoc-Fellow) or 3254 (Postdoc-Paid Direct) , the DOS Code is PDW, and the Time Report Code is not "W", message "DOS PDW must have Time Report Code of W." will be issued with severity level of Employee Reject in on-line and batch.

  If title code is 3253 (Postdoc-Fellow) or 3254 (Postdoc-Paid Direct) , the Time Report Code is "W", and the DOS Code is not PDW, message "Time Report Code W must have DOS PDW." will be issued with severity level of Employee Reject in on-line and batch.

- If title code is 3253 (Postdoc-Fellow) or title code is 3254 (Postdoc-Paid Direct) , the Time Report Code is "W", the Percent Full-Time should be greater than zero.

  If title code is 3253 (Postdoc-Fellow) or title code is 3254 (Postdoc-Paid Direct) , the Time Report Code is "W," and the Time Appointment Code is not greater than zero, message "Postdoc Appt must have appointment percent greater than zero" will be issued with severity of Employee Reject in on-line and batch.

- If title code is not 3253 (Postdoc-Fellow) and title code is not 3254 (Postdoc-Paid Direct) , the DOS Code cannot be PDW.

  If title code is not 3253 (Postdoc-Fellow) and title code is not 3254 (Postdoc-Paid Direct) , and the DOS Code is PDW, message "DOS PDW is for TC 3253 & 3254 only." will be issued with severity level of Employee Reject in on-line and batch.

- If title code is not 3253 (Postdoc-Fellow) , and the DOS Code is PDD, an error message should be issued.

  If title code is not 3253 (Postdoc-Fellow) and the DOS Code is PDD, message "DOS PDD is for TC 3253 only." will be issued with severity of Employee Reject in on-line and batch.

- If title code is not 3253 (Postdoc-Fellow) , and the DOS Code is FEN or FEL, an error message should be issued.

  If title code is not Postdoc-Fellow (TC 3253) and the DOS Code is FEN or FEL, message "DOS FEN and FEL for Postdoc fellows only" will be issued with severity of Employee Reject in on-line and batch.

- When the title code is 3253 or 3254 and the Insurance Reduction Code is not "N", message "Title Codes 3253 and 3254 are ineligible to participate in TIP" will be issued with severity level of Data Override; and the Insurance Reduction Code will be set to "N".

Page 13   Final
BELI Derivation – Student Appointments
BELI Derivation – Postdoc Appointments
EDB File Maintenance – Postdoc DOS Edits
One-time Postdoc Related Edits
November 1, 2004

Program Changes

PPCTDOSE

Currently, PPCTDOSE sets the Staff Object Code to zeros when the Staff Object Code field on the DOS transaction is entered with an asterisk ('*'), and sets the Academic Object Code to zero when the Academic Object Code field on the DOS transaction is entered with an asterisk ('*').

This module will be changed to set the Staff Object Code to blank when the Staff Object Code field on the DOS transaction is entered with a value of '*', and set the Academic Object Code to blank when the Academic Object Code field on the DOS transaction is entered with a value of '*'.

PPPBELI

Currently, PPPBELI derives an employee's Benefits Eligibility Level Indicator (Derived BELI) (EDB 0375) from information contained on the employee's EDB records.

The modifications to PPPBELI will be added as follows:

- The logic that selects the appointments for calculation of total duration and percent of appointments will be modified to exclude student appointments from the selection process. That is, appointments associated with Appointment Type of '4' (EDB 2020) or the CTO (Class Title Outline) value on the Title Code Table for appointments with a Title Code (EDB 2006) in the range of 400 through 499 will be excluded from the calculation of total duration and percent of appointments, and thus will not be loaded into the existing internal Appointment Table.

- Currently, each single active appointment is checked to determine whether it meets the 12 months (total duration)/Appointment Percent of 50% or more (EDB 2012) or the 3 months or more/Appointment Percent of 100%) condition. At the same time, the selected active appointment is loaded into an internal Appointment table. If a single active appointment meets either condition, the derived BELI is appropriately set and the rest of the logic is bypassed. The logic that loads each selected active appointment into the internal Appointment table will be modified such that only non-postdoc appointments will be loaded into the internal Non-postdoc Appointment table.

  If none of the single active appointments meet the 12 months (total duration)/Appointment Percent of 50% or more (EDB 2012) or the 3 months or more/Appointment Percent of 100%) condition, the logic loops through each entry in the loaded internal Appointment table to accumulate the Total Appointment Percent. If the Total Appointment Percent meets the 12 months (total duration)/Appointment Percent of 50% or more (EDB 2012) or the 3 months or more/Appointment Percent of 100%) condition, the derived BELI is appropriately set.

  The current logic that checks each single active appointment to determine whether it meets at least 12 months (total duration)/Appointment Percent of 50% or more (EDB 2012) or at least 3 months/Appointment Percent of 100%), and loads each single active appointment into an internal Appointment table will be replicated specifically for postdoc titles (3252, 3253, 3254). Only active postdoc titles will be selected. Each selected active postdoc appointment data will be loaded into the internal Postdoc Appointment table. If the single active postdoc appointment does meet at least 12 months

Page 14   Final
BELI Derivation – Student Appointments
BELI Derivation – Postdoc Appointments
EDB File Maintenance – Postdoc DOS Edits
One-time Postdoc Related Edits
November 1, 2004

(total duration)/Appointment Percent of 50% or more (EDB 2012) or at least 3 months/Appointment Percent of 100%) condition, the derived BELI will be appropriately set to 'P' and the rest of the logic is bypassed.

The current logic that loops through each entry in the loaded internal Appointment table to accumulate the Total Appointment Percent will be replicated specifically for postdoc titles. When the logic loops through each entry in the loaded internal Postdoc Appointment table, and if the Total Postdoc Appointment Percent meets at least 12 months (total duration)/Appointment Percent of 50% or more (EDB 2012) or at least 3 months or more/Appointment Percent of 100%) condition, the derived BELI will be appropriately set to 'P' and the rest of the logic is bypassed.

It is noted that the logic to check each single active postdoc appointment and the logic that loops through each entry in the internal Postdoc Appointment table will be placed ahead of the current logic that checks a single non-postdoc appointment and the logic that loops through each entry in the loaded internal non-postdoc Appointment table to determine whether it meets at least 12 months (total duration)/Appointment Percent of 50% or more (EDB 2012) or at least 3 months or more/Appointment Percent of 100%). Thus, if the derived BELI is not set to 'P', the existing logic that checks each single active non-postdoc appointment and the logic that loops through each entry in the internal Non-postdoc Appointment table will be executed.

- In addition, temporary code will be placed in this module for monthly maintenance process to begin December only.

  If monthly maintenance to begin December is run, any postdoc appointments with an Appointment Begin date of January 1, 2005 or prior and the Appointment End date is later than December 31, 2004 will be considered for current postdoc processing.

PPDXAPPT, PPDXBENI

These modules display the "Summary of UC Benefits Enrollment" on the document. The translated Retirement Code (EDB 0122) is displayed underneath the line that displays "***Your appointment has qualified you for***:".

Not all Postdoc Scholars with a Retirement Code value of 'H' are subject to participate in Safe Harbor DCP deductions. Therefore, if the individual's Assigned BELI is 'P', the translated Retirement Code (translated to "***Univ of Calif Defined Contribution Plan***") will not be displayed.

PPEC051

The following edits for postdoc titles will be added for USER08 processing:

- If title code is 3253 (Postdoc-Fellow) or 3254 (Postdoc-Paid Direct), the DOS Code associated with the Distribution should be PDW, PDD, FEN, or FEL.

  If title code is 3253 (Postdoc-Fellow) or 3254 (Postdoc-Paid Direct), and the DOS Code is not PDW, PDD, FEN, or FEL, message "Invalid DOS Code for Postdoc Fellow or Paid Direct." will be issued with the severity of Employee Reject in on-line and batch. The remaining edits below will be bypassed.

- If title code is 3254 (Postdoc-Paid Direct), the DOS Code associated with the Distribution should be PDW (PDS-WOS-Not UC Paid).

Page 15   Final
BELI Derivation – Student Appointments
BELI Derivation – Postdoc Appointments
EDB File Maintenance – Postdoc DOS Edits
One-time Postdoc Related Edits
November 1, 2004

If title code is 3254 (Postdoc-Paid Direct), and the DOS Code is not PDW, message "Postdoc-Pd Direct must have DOS of PDW" will be issued with the severity of Employee Reject in on-line and batch.

- If title code is 3253 (Postdoc-Fellow) , the DOS Code should be PDW.

   If title code is 3253 (Postdoc-Fellow) , and the DOS is not PDW, message "Postdoc-Fellow must have DOS of PDW" with the severity of Employee Reject in on-line and batch.

   For those campuses who are compensating the Postdoc-Fellow (TC 3253) through PPS, local campuses should set the severity to '0' (Suppress Print).

- If title code is 3253 (Postdoc-Fellow), the Citizenship Status Code is C, P, or R, the DOS Code on the distribution should be FEL, message "DOS FEL is for NRA Postdoc only" will be issued with the severity of Employee Reject in on-line and batch.

- If title code is 3253 (Postdoc-Fellow), and the DOS Code is FEN and the Citizenship Status Code is not C, P, or R, message "DOS FEN may not be used for NRA Postdoc" will be issued with severity of Employee Reject in on-line and batch.

- If title code is 3253 (Postdoc-Fellow) or title code is 3254 (Postdoc-Paid Direct) , the DOS Code should be "PDW" with Time Report Code "W".

   If title code is 3253 (Postdoc-Fellow) or 3254 (Postdoc-Paid Direct) , the DOS Code is PDW, and the Time Report Code is not "W", message "DOS PDW must have Time Report Code of W." will be issued with severity level of Employee Reject in on-line and batch.

   If title code is 3253 (Postdoc-Fellow) or 3254 (Postdoc-Paid Direct) , the Time Report Code is "W", and the DOS Code is not PDW, message "Time Report Code W must have DOS PDW." will be issued with severity level of Employee Reject in on-line and batch.

- If title code is 3252 (Postdoc Employee), or title code is 3253 (Postdoc-Fellow) , or title code is 3254 (Postdoc-Paid Direct) , the Percent Full-Time should be greater than zero.

   If title code is 3253 (Postdoc-Fellow) or title code is 3254 (Postdoc-Paid Direct) , the Time Report Code is "W," and the Time Appointment Code is not greater than zero, message "Postdoc Appt must have appointment percent greater than zero" will be issued with severity of Employee Reject in on-line and batch.

- If title code is not 3253 (Postdoc-Fellow) and title code is not 3254 (Postdoc-Paid Direct) , the DOS Code cannot be PDW.

   If title code is not 3253 (Postdoc-Fellow) and title code is not 3254 (Postdoc-Paid Direct) , and the DOS Code is PDW, message "DOS PDW is for TC 3253 & 3254 only." will be issued with severity level of Employee Reject in on-line and batch.

- If title code is not 3253 (Postdoc-Fellow) , and the DOS Code is PDD, an error message should be issued.

Page 16   Final
BELI Derivation – Student Appointments
BELI Derivation – Postdoc Appointments
EDB File Maintenance – Postdoc DOS Edits
One-time Postdoc Related Edits
November 1, 2004

If title code is not 3253 (Postdoc-Fellow) and the DOS Code is PDD, message "DOS PDD is for TC 3253 only." will be issued with severity of Employee Reject in on-line and batch.

- If title code is not 3253 (Postdoc-Fellow) , and the DOS Code is FEN or FEL, an error message should be issued.

  If title code is not Postdoc-Fellow (TC 3253) and the DOS Code is FEN or FEL, message "DOS FEN and FEL for Postdoc fellows only" will be issued with severity of Employee Reject in on-line and batch.

- If title code is not 3253 (Postdoc-Fellow) , and the DOS Code is FEN or FEL, an error message should be issued.

  If title code is not Postdoc-Fellow (TC 3253) and the DOS Code is FEN or FEL, message "DOS FEN and FEL for Postdoc fellows only" will be issued with severity of Employee Reject in on-line and batch.

PPEC052

This module will be modified to include the related Postdoc DOS Code of 'PDW' to the existing logic that checks for DOS Code of 'WOS'.

PPEC137

The following edit will be added to PPEC137:

If the appointment is a Postdoc-Fellow (TC 3253) or Postdoc-Paid Direct (TC 3254) and the Citizenship Status Code is N, E, F, A, S, or X, Tax Treaty Income Code of '15' must be entered. Otherwise message "NRA Postdoc-Fellow or Postdoc-Paid Direct must have Income Code 15" will be issued with a severity of Employee Reject in on-line and batch.

PPEI051

This module will be modified to include the related Postdoc DOS Code of 'PDW' to the existing logic that checks for DOS Code of 'WOS'.

PPEI053

This module will be modified to include the Postdoc DOS Code of 'PDW' to the existing logic that checks for DOS Code of 'WOS'.

The following edits for postdoc titles will be added for USER12 processing:

- If title code is 3253 (Postdoc-Fellow) or 3254 (Postdoc-Paid Direct), the DOS Code associated with the Distribution should be PDW, PDD, FEN, or FEL.

  If title code is 3253 (Postdoc-Fellow) or 3254 (Postdoc-Paid Direct), and the DOS Code is not PDW, PDD, FEN, or FEL, message "Invalid DOS Code for Postdoc Fellow or Paid Direct." will be issued with the severity of Employee Reject in on-line and batch. The remaining edits below will be bypassed.

Page 17   Final
BELI Derivation – Student Appointments
BELI Derivation – Postdoc Appointments
EDB File Maintenance – Postdoc DOS Edits
One-time Postdoc Related Edits
November 1, 2004

- If title code is 3254 (Postdoc-Paid Direct), the DOS Code associated with the Distribution should be PDW (PDS-WOS-Not UC Paid).

  If title code is 3254 (Postdoc-Paid Direct), and the DOS Code is not PDW, message "Postdoc-Pd Direct must have DOS of PDW" will be issued with the severity of Employee Reject in on-line and batch.

- If title code is 3253 (Postdoc-Fellow) , the DOS Code should be PDW.

  If title code is 3253 (Postdoc-Fellow) , and the DOS is not PDW, message "Postdoc-Fellow must have DOS of PDW" with the severity of Employee Reject in on-line and batch.

  For those campuses who are compensating the Postdoc-Fellow (TC 3253) through PPS, local campuses should set the severity to '0' (Suppress Print).

- If title code is 3253 (Postdoc-Fellow), the Citizenship Status Code is C, P, or R, the DOS Code on the distribution should be FEL, message "DOS FEL is for NRA Postdoc only" will be issued with the severity of Employee Reject in on-line and batch.

- If title code is 3253 (Postdoc-Fellow), and the DOS Code is FEN and the Citizenship Status Code is not C, P, or R, message "DOS FEN may not be used for NRA Postdoc" will be issued with severity of Employee Reject in on-line and batch.

- If title code is 3253 (Postdoc-Fellow) or title code is 3254 (Postdoc-Paid Direct) , the DOS Code should be "PDW" with Time Report Code "W".

  If title code is 3253 (Postdoc-Fellow) or 3254 (Postdoc-Paid Direct) , the DOS Code is PDW, and the Time Report Code is not "W", message "DOS PDW must have Time Report Code of W." will be issued with severity level of Employee Reject in on-line and batch.

  If title code is 3253 (Postdoc-Fellow) or 3254 (Postdoc-Paid Direct) , the Time Report Code is "W", and the DOS Code is not PDW, message "Time Report Code W must have DOS PDW." will be issued with severity level of Employee Reject in on-line and batch.

- If title code is 3252 (Postdoc Employee), or title code is 3253 (Postdoc-Fellow) , or title code is 3254 (Postdoc-Paid Direct) , the Percent Full-Time should be greater than zero.

  If title code is 3253 (Postdoc-Fellow) or title code is 3254 (Postdoc-Paid Direct) , the Time Report Code is "W," and the Time Appointment Code is not greater than zero, message "Postdoc Appt must have appointment percent greater than zero" will be issued with severity of Employee Reject in on-line and batch.

- If title code is not 3253 (Postdoc-Fellow) and title code is not 3254 (Postdoc-Paid Direct) , the DOS Code cannot be PDW.

  If title code is not 3253 (Postdoc-Fellow) and title code is not 3254 (Postdoc-Paid Direct) , and the DOS Code is PDW, message "DOS PDW is for TC 3253 & 3254 only." will be issued with severity level of Employee Reject in on-line and batch.

Page 18   Final
BELI Derivation – Student Appointments
BELI Derivation – Postdoc Appointments
EDB File Maintenance – Postdoc DOS Edits
One-time Postdoc Related Edits
November 1, 2004

- If title code is not 3253 (Postdoc-Fellow) , and the DOS Code is PDD, an error message should be issued.

  If title code is not 3253 (Postdoc-Fellow) and the DOS Code is PDD, message "DOS PDD is for TC 3253 only." will be issued with severity of Employee Reject in on-line and batch.

- If title code is not 3253 (Postdoc-Fellow) , and the DOS Code is FEN or FEL, an error message should be issued.

  If title code is not Postdoc-Fellow (TC 3253) and the DOS Code is FEN or FEL, message "DOS FEN and FEL for Postdoc fellows only" will be issued with severity of Employee Reject in on-line and batch.

- If title code is not 3253 (Postdoc-Fellow) , and the DOS Code is FEN or FEL, an error message should be issued.

  If title code is not Postdoc-Fellow (TC 3253) and the DOS Code is FEN or FEL, message "DOS FEN and FEL for Postdoc fellows only" will be issued with severity of Employee Reject in on-line and batch.

PPEI203

This module will be modified to include the related Postdoc DOS Code of 'PDW' to the existing logic that checks for DOS Code of 'WOS'.

USER08

This module will be modified to include the Postdoc DOS Code of 'PDW' (Postdoc Without Salary) to the existing logic that checks for DOS Code of 'WOS'.

Page 19   Final
BELI Derivation – Student Appointments
BELI Derivation – Postdoc Appointments
EDB File Maintenance – Postdoc DOS Edits
One-time Postdoc Related Edits
November 1, 2004

RDO (Resource Definition On-line)

PPEC025

Batch RDO transactions will be created to update the on-line CSD for PPEC025.

Page 20 Final
BELI Derivation – Student Appointments
BELI Derivation – Postdoc Appointments
EDB File Maintenance – Postdoc DOS Edits
One-time Postdoc Related Edits
November 1, 2004

System Control Table Updates

Description of Service

Some campuses may already have DOS Codes of PDD, PDW, FES, FEL, and/or FEN set up in the Control tables. Delete transactions will be provided at the beginning of the DOS transaction File for those DOS Codes. If campuses don't have one or more of the Postdoc Dos Codes, PPP004 will reject those particular transactions. As an alternative, campuses can remove the Delete DOS transactions if necessary.

Valid DOS codes of 'PDD', 'FEN', 'FEL', and 'PDW' and the related data values will be added to the DOS table.

Data Element

New value of '15' will be added to data element 1170 (Tax Treaty Income Code) and 1171 (Alternate TT Income Code).

Trigger values of 025 and 137 for consistency edits will be added to data element 2006 (Appointment Title Code).

Trigger value of 25 for consistency edits will be added to data element 2012 (Appointment Percent Fulltime) and data element 2017 (Appointment Time Code).

Trigger value of 025 for consistency edits will be added to data element 2056 (DOS Code).

System Messages

Messages related to Postdoc appointments and distributions will be added to the table.

Code Translation

Code translations for the PSBP medical, dental, vision, and supplemental disability plans will be added to the Code Translation table. These will be used in a subsequent release of Postdoc changes.

Job Group Identifier Description

Description of "POSTDOCTORAL SCHOLAR" will be defined for Job Group ID of PDS.

Job Group Identifier Title Code

Postdoc Titles of 3252, 3253, and 3254 will be defined for Job Group ID of 'PDS' and EE06 Category of 'B'.

Processing Group

New module PPEC025 to edit Postdoc appointments and distributions will be added to the Program IDs 08 and 12.

Page 21   Final
BELI Derivation – Student Appointments
BELI Derivation – Postdoc Appointments
EDB File Maintenance – Postdoc DOS Edits
One-time Postdoc Related Edits
November 1, 2004

Routine Definition

New module PPEC025 (Postdoc Appointment Edits) will be defined in the Routine Definition table.

Page 22   Final
BELI Derivation – Student Appointments
BELI Derivation – Postdoc Appointments
EDB File Maintenance – Postdoc DOS Edits
One-time Postdoc Related Edits
November 1, 2004

Attachments

Attachment A – Data Dictionary Entries
Attachment B – One-time report

Page 23   Final
BELI Derivation – Student Appointments
BELI Derivation – Postdoc Appointments
EDB File Maintenance – Postdoc DOS Edits
One-time Postdoc Related Edits
November 1, 2004

System Number: EDB0360

User Access Name: 0360-1

Programming Name: BELI_IND IN PPPBEL

Revision Date: 08/01/04

Comments

```
Location(s):   HBN 4511  - Benefits Eligibility Level-Assigned-HBN in
HDB
               APS 3332  - Benefits Eligibility Level-Assigned
               BCS 3332  - Benefits Eligibility Level-Assigned
               CPS 3332  - Benefits Eligibility Level-Assigned
               IPS 3332  - Benefits Eligibility Level-Assigned
               OPP 3332  - Benefits Eligibility Level-Assigned
```

Name: BENEFITS ELIGIBILITY LEVEL INDICATOR-ASSIGNED-EDB

Type: ALPHANUMERIC

Length: 1

Format

N/A

General Description

Code indicating the set of benefits for which the individual is
eligible.

Code Interpretation

```
1    -    Full benefits eligibility.
2    -    Mid-level benefits eligibility - not a member of a retirement
          system and appointment is for 12 months or more.
3    -    Mid-level benefits eligibility - not a member of a retirement
          system and appointment is for less than 12 months.
4    -    Core benefits eligibility only - Average Hours Worked per
          Week (EDB 5132) meets minimum eligibility requirement.
5    -    No benefits eligibility for any of the following reasons:
          - Average Hours Worked per Week (EDB 5132) does not meet
            minimum eligibility requirement
          - Appointments are either Casual/Restricted or are in Titles
            restricted to students
          - Appointments are Per Diem in nature
          - "By agreement" appointments
          - Appointment without salary
P    -    Postdoctoral scholar benefits eligibility
```

Page 24   Final
BELI Derivation – Student Appointments
BELI Derivation – Postdoc Appointments
EDB File Maintenance – Postdoc DOS Edits
One-time Postdoc Related Edits
November 1, 2004

```
?     -     No value assigned or separated employee



NOTE - Previous code values are attached
         EDB 0360 BENEFITS ELIGIBILITY LEVEL INDICATOR - ASSIGNED

                CODE VALUES PRIOR TO JANUARY 1, 1995



5               No benefits eligibility - Average Hours Worked per Week
                (EDB 5132) does not meet minimum eligibility requirement


6     -     No benefits eligibility - appointments are either
                Casual/Restricted or are in Titles restricted to students


7     -     No benefits eligibility - appointments are Per Diem in nature


8     -     No benefits eligibility - "by agreement" appointments


9     -     No benefits eligibility - appointment without salary
```

Page 25   Final
BELI Derivation – Student Appointments
BELI Derivation – Postdoc Appointments
EDB File Maintenance – Postdoc DOS Edits
One-time Postdoc Related Edits
November 1, 2004

System Number: EDB0375

User Access Name: 0375-3

Programming Name: BELI_DERIVED_IND IN PPPBEL

Revision Date: Revision Date: 08/01/04

Comments

```
Location(s):   HBN 4514  - Benefits Eligibility Level Indicator-Derived-
HBN in HDB
               APS 3333  - Benefits Eligibility Level Indicator-Derived
               BCS 3333  - Benefits Eligibility Level Indicator-Derived
               CPS 3333  - Benefits Eligibility Level Indicator-Derived
               IPS 3333  - Benefits Eligibility Level Indicator-Derived
               OPP 3333  - Benefits Eligibility Level Indicator-Derived
```

Name: BENEFITS ELIGIBILITY LEVEL INDICATOR-DERIVED-EDB

Type: ALPHANUMERIC

Length: 1

Format

N/A

General Description

Code indicating the system derived estimate of the set of benefits for which the individual is eligible.

Code Interpretation

EDB 0375 BENEFITS ELIGIBILITY LEVEL INDICATOR - DERIVED


```
1     -    Average Hours Worked Per Week (EDB 5132) meets the minimum
           eligibility requirement; Retirement System Code is not blank
           or 'N';
           employee record reflects non-excludable, non-expired
           appointment(s)
           with duration of at least twelve months at least 50 percent.


2     -    Average Hours Worked Per Week (EDB 5132) meets the minimum
           eligibility requirement; Retirement System Code is blank or
           'N';
           employee record reflects non-excludable, non-expired
           appointment(s)
           with duration of at least twelve months at least 50 percent.
```

Page 26   Final
BELI Derivation – Student Appointments
BELI Derivation – Postdoc Appointments
EDB File Maintenance – Postdoc DOS Edits
One-time Postdoc Related Edits
November 1, 2004

```
3       -       Average Hours Worked Per Week (EDB 5132) meets the minimum
                eligibility requirement; Retirement System Code is blank or
                'N';
                employee record reflects non-excludable, non-expired
                appointment(s) with duration of at least 3 months at 100
                percent.


4       -       Average Hours Worked Per Week (EDB 5132) meets the minimum
                eligibility requirement; employee record reflects non-
                excludable, non-expired appointment(s).


5       -       Average Hours Worked Per Week (EDB 5132) does not meet minimum
                eligibility requirement; employee record reflects non-
                excludable, non-expired appointment(s).


6       -       Employee record reflects no non-excludable, non-expired
                appointments but does reflect at least one appointment which
                either:
                   - Has an Appointment Type Code of '4' (Casual/Restricted),
                     or
                 -  Has a Title Code which is restricted to students (Class
                    Title Outline between 400 and 499).


7       -       Employee record reflects no non-excludable, non-expired
                appointments but does reflect at least one appointment which
                has an Appointment Type Code of '6' (Per Diem).


8       -       Employee record reflects no non-excludable, non-expired
                appointments but does reflect at least one appointment which
                has an Appointment Rate Code of 'B' ('by agreement' pay).


9       -       Employee record reflects no non-excludable, non-expired
                appointments but does reflect at least one appointment which
                has a Without Salary Indicator of 'Y'.


P       -       Employee record reflects at least one appointment with a
                postdoctoral title with a duration of at least twelve months
                at 50 percent time or more or at least three months at 100%.


U       -       Average Hours Per Week are equal to zero (invalid average);
                employee record reflects non-excludable, non-expired
                appointment(s).
```

Page 27   Final
BELI Derivation – Student Appointments
BELI Derivation – Postdoc Appointments
EDB File Maintenance – Postdoc DOS Edits
One-time Postdoc Related Edits
November 1, 2004

```
X    -    Average Hours Per Week are equal to zero (invalid average);
          employee record reflects no appointments.
```

Page 28   Final
BELI Derivation – Student Appointments
BELI Derivation – Postdoc Appointments
EDB File Maintenance – Postdoc DOS Edits
One-time Postdoc Related Edits
November 1, 2004

System Number: EDB1170

User Access Name: 1170-3

Programming Name: TT_INCOME_CODE IN PPPPAY

Revision Date: 10/07/04

Comments

```
Location(s):   N/A
```

Name: TAX TREATY INCOME CODE

Type: ALPHANUMERIC

Length: 2

Format

N/A

General Description

Code indicating a type of income the employee is receiving and claiming as exempt from federal tax under the provisions of a tax treaty.

Code Interpretation

```
15     - Scholarship and Fellowship Grants given to an individual for
         study, training, or research, and which does not constitute
         compensation for personal services.
18     - Compensation for teaching
19     - Compensation during training
20     - Earnings as an artist or athlete
```

Page 29   Final
BELI Derivation – Student Appointments
BELI Derivation – Postdoc Appointments
EDB File Maintenance – Postdoc DOS Edits
One-time Postdoc Related Edits
November 1, 2004

System Number: EDB1171

User Access Name: 1171-4

Programming Name: ALT_TT_CODE IN PPPPAY

Revision Date: 10/07/04

Comments

```
Location(s):   N/A
```

Name: TAX TREATY INCOME CODE-ALTERNATE

Type: ALPHANUMERIC

Length: 2

Format

N/A

General Description

Code indicating an additional type of income the employee is receiving and claiming as exempt from federal tax under the provisions of a tax treaty.

Code Interpretation

```
15     - Scholarship and Fellowship Grants given to an individual for
         study, training, or research, and which does not constitute
         compensation for personal services.
18     - Compensation for teaching
19     - Compensation during training
20     - Earnings as an artist or athlete
```

Page 30   Final
BELI Derivation – Student Appointments
BELI Derivation – Postdoc Appointments
EDB File Maintenance – Postdoc DOS Edits
One-time Postdoc Related Edits
November 1, 2004

```
OT16052/PPOT1605/090104                    UNIVERSITY OF CALIFORNIA-SYSTEM              PAGE NO.      000001
RETN: SEE RPTS DISP SCHEDULE/DIST.                   ONE-TIME PROCESS                   RUN DATE    10/25/04
                                            ONETIME EDITS ON POSTDOC TITLES             RUN TIME    07:21:53

      :UNKNOWN DEPT

NAME/ID                      CIT  APPT# PERCENT  TIME    TITLE  DIST#  DOS TT INS  ----------------- ERROR MESSAGES --------------
                             CODE                RPT CD                    CD RED

COLOGNE, CY                  C    10   1.00     E       3253              00  H    TITLE 3253 OR 3254 CANNOT PARTICIPATE IN TIP
501000058

EXIT, CLOSE D.               C    10   1.00     E       3253              00       TITLE 3253 OR 3254 CANNOT PARTICIPATE IN TIP
501000055

WONDER, WALLY                C    10   1.00     E       3253              00  Y    TITLE 3253 OR 3254 CANNOT PARTICIPATE IN TIP
501000056

OT16052/PPOT1605/090104                    UNIVERSITY OF CALIFORNIA-SYSTEM              PAGE NO.      000002

RETN: SEE RPTS DISP SCHEDULE/DIST.                   ONE-TIME PROCESS
                                            ONETIME EDITS ON POSTDOC TITLES

804918:CHANCELLORS OFFICE

NAME/ID                      CIT  APPT# PERCENT  TIME    TITLE  DIST#  DOS TT INS
                             CODE                RPT CD                    CD RED

AH, BARB L.                  F    10   1.00     W       3253   11   PDW 00  N    POSTDC TITLE 3253 OR 3254 MUST HAVE TT INC CD 15

BAGEL, RUDY                  C    10    .50     A       3253   11   REG 00  N    CIT/RES POSTDOC MUST USE DOS FEN, PDD, OR PDW
501000006

BELT, CARTER                 C    10   1.00     E       3253   11   BYA 00       TITLE 3253 OR 3254 CANNOT PARTICIPATE IN TIP
000050058                                                                       CIT/RES POSTDOC MUST USE DOS FEN, PDD, OR PDW
```