Release 1607
Detailed Design

Postdoctoral Scholar Benefits Modifications
Service Request 16935

One-Time Postdoctoral Scholar Open Enrollment
Carrier File
Service Request 81049

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Introduction

*Release 1605* (Phase 1 of Postdoctoral Scholar changes) contained the first release addressing implementation of benefits for postdoctoral scholars. That release contained the one-time program for checking DOS codes for inconsistencies, on-going EDB DOS Code edits, BELI derivation related to Postdoctoral Scholars, Insurance Reduction Indicator edit related to Postdoc Scholars, and edits for tax treaty income codes. In addition, the BELI Derivation process (PPPBELI) contains temporary code specifically for the monthly maintenance to begin December.

This release contains the one-time program to set the Assigned BELI (EDB0360) to ‘P’ for those Postdoctoral Scholars whose Derived BELI (EDB 0375) is ‘P’, EDB File Maintenance edits for Assigned BELI and postdoc medical, dental, and vision plans, EDB Daily Maintenance process, and EDB Monthly Periodic Maintenance process. In addition, a one-time is provided to produce a separate open enrollment carrier file for postdoc plans.

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 will be eligible for the following benefits:

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

Note that Service Request 16933 refers to the benefits being offered to postdoc scholars as the Postdoc House Staff Insurance Program (PSBP), acknowledging that the benefits may also be offered to House Staff employees in the future. Since this document was prepared before that name was determined, it should be noted that references in this document to “postdoc benefits” should be considered equivalent to “PSBP benefits” in Service Request 16933.

Summary of PPS Modifications for benefits

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.
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.
11. One-time program will be developed to set the Assigned BELI of Postdoctoral Scholars to a value of ‘P’.

Service Request 81049

One-time process to create OE carrier file for PSBP enrollments

Background

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 this policy, UC will provide certain health and welfare benefits plans, collectively known as the Postdoctoral Scholar Benefit Plan (PSBP) to postdoctoral scholars, effective January 1, 2005.

Service Requests 16933 and 16935 address the various modifications to the Payroll/Personnel System (PPS) necessary to provide and monitor enrollment in these benefits. Because certain decisions about the PSBP were not finalized until late in the year, the web-based open enrollment process will not be available to postdoctoral scholars this year. Instead, they will make selections using enrollment forms which will be entered into the PPS at each location. Because of this difference in enrollment method, a special one-time process must be provided to create the open enrollment files for the PSBP carriers.

One-time Program

A one time program should be developed that selects information from the EDB and creates a file in the format of the regular carrier enrollment file each month by PPS.

If the current benefit plan code is 'P1', 'P2', 'P3', 'P4', or 'P5' and the current benefit effective date is 01/01/2005, or the future benefits plan code is 'P1', 'P2', 'P3', 'P4', or 'P5' and the future benefit effective date is 01/01/2005, then report the data on Type '1' (Employee data), and/or Type '2' (Dependent data) record on the Carrier Enrollment file. Also, if the postdoctoral scholar’s address is a foreign address, create a Type '4' (Foreign Address data) record.

The premium field should be zero filled, and the appropriate coverage level for the coverage in effect on 01/01/2005 should be derived.
Overview

- New values for the Assigned BELI, Derived BELI, and the Medical, Dental, and Vision Plan Codes will be defined.

- New GTN numbers will be assigned for the postdoc medical, dental, and vision plans.

- 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.

- The PIE derivation process will be modified to derive a PIE when an Assigned BELI of ‘P’ is assigned.

- 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 Assigned BELI is ‘P’.

- 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.

- 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.

- 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.

- One-time program will be developed to set the Assigned BELI to ‘P’ for postdoctoral scholars if their Derived BELI is equal to ‘P’.

- One-time program will be developed to produce an open enrollment carrier file containing postdoc plans for postdoctoral scholars.
Bind Member Changes

PPO1607A
This Bind member will contain bind statements for one-time program PPO1607A.

PPO1607B
This Bind member will contain bind statements for one-time program PPO1607B.
One-time Programs

PPO1607A

Background Information

When the Assigned BELI is set to ‘P’, any enrollments in existing employee plans will be end dated and “placeholder” medical, dental, and vision plan codes will be established. Because the postdoc plans are available January 1, 2005, the Assigned BELI must be set to ‘P’ after premiums have been taken from November pay for December coverage and before taking premiums from December pay for January coverage.

Because some campuses have already added postdoctoral scholar appointments to the EDB and other locations will begin adding them before December, a one-time program is requested to set the Assigned BELI to ‘P’ for those postdoctoral scholars eligible for postdoc benefits.

It has been suggested that one way to make this happen is to put temporary code into the monthly maintenance process to force derivation of the Derived BELI based on eligible postdoctoral appointment titles so that the Derived BELI (EDB 0375) is set to P.

The one-time program should be run immediately after monthly maintenance to begin December has set the Derived BELI to ‘P’ for all eligible postdoctoral scholars. For each eligible postdoctoral scholar, the one-time should create an X1 transaction to set the Assigned BELI to ‘P’ and the BELI Effective Date to 01/05/05. These transactions should be run into a regular EDB maintenance process so that appropriate derivations of BELI Change Date, BELI Conflict Date, etc. will be performed. This existing process will also apply end dates as required to any existing non-postdoc coverage in which the postdoctoral scholar is enrolled.

One-Time Process

The one-time program will select EDB records based on the following conditions:

- Appointment Title Code is ‘3252’, ‘3253’, or ‘3254’ and the
- Appointment Begin date is equal to or prior to ‘2005-01-01’ and Appointment End Date is later than ‘2004-12-31’

Further processing of the selected population will determine whether an ‘X1’ transaction will be produced. If the postdoctoral scholar’s Derived BELI (EDB 0375) is equal to ‘P’, an ‘X1’ transaction will be written containing the Assigned BELI (EDB 0360) value of ‘P’ and the BELI Effective Date (EDB 0341) of ‘010105’. The selected postdoctoral scholar will be reported on the O1607A1 report for individuals whose Derived BELI is ‘P’. If the selected postdoctoral scholar’s Derived BELI (EDB 0375) is not ‘P’, the postdoctoral scholar will be reported on the O1607A2 report for individuals whose Derived BELI is not ‘P’. (Sample reports are in the Attachment section of this document).

PPO1607B

Background Information
Service Requests 16933 and 16935 address the various modifications to the Payroll/Personnel System (PPS) necessary to provide and monitor enrollment in these benefits. Because certain decisions about the PSBP were not finalized until late in the year, the web-based open enrollment process will not be available to postdoctoral scholars this year. Instead, they will make selections using enrollment forms which will be entered into the PPS at each location. Because of this difference in enrollment method, a special one-time process must be provided to create the open enrollment files for the PSBP carriers.

**One-Time Process**

This one-time program selects current and future benefits records on the EDB BEN and FCB tables which meet the following criteria:

- Benefit plan code = 'P1', 'P2', 'P3', 'P4', or 'P5'
- Benefit effective date between 01/01/2005 and 01/31/2005 inclusively

For each individual selected, the program creates an enrollment carrier file Type '1' (employee data) record. For each dependent, a Type '2' (dependent data) record is also created. If the individual has a foreign address, a Type '4' record is also created.

All premiums are set to zero and the appropriate coverage level for the coverage in effect on 01/01/2005 are derived.

Campuses will ftp the generated files to UCOP where they will be merged and sent to the carriers.
New Programs

PPEC165

This module will be developed for postdoc benefits consistency edits.

The following edits for medical, dental, and vision will be performed.

**Medical**

If Assigned BELI (EDB 0360) is ‘P’ and previous Assigned BELI is ‘P’, the only values that are allowed for the Medical Plan Code (EDB 0292) and the Future Medical Plan Code are ‘P1’ and ‘P2’.

If XX (opt out) is entered, the update will be rejected and messages will be issued from USER08 and USER12 with the text “MAY NOT OPT OUT OF POSTDOC PLANS – USE END DATE”. The messages will have a severity of ‘Employee Reject’ in on-line and batch. This edit will be triggered whenever the Assigned BELI or the Medical Plan Code is changed.

If XC (cancel) is entered, the update will be rejected and messages will be issued from USER08 and USER12 with the text “DO NOT USE ‘XC’ TO CANCEL POSTDOC PLAN – USE END DATE”. The messages will have a severity of ‘Employee Reject’ in on-line and batch. This edit will be triggered whenever the Assigned BELI or the Medical Plan Code is changed.

If any other value is entered, the update will be rejected and messages will be issued from USER08 and USER12 with the text “BELI ‘P’ – MEDICAL PLAN MUST BE A POSTDOC PLAN”. The messages will have a severity of ‘Employee Reject’ in on-line and batch. This edit will be triggered whenever the Assigned BELI or the Medical Plan Code is changed.

Note that a value of ‘XD’ is derived upon non-payment of premiums, and this value will still be supported.

In addition, if the assigned BELI is ‘P’ and the Medical Plan Code is ‘P1’ or ‘P2’, and the corresponding Plan Coverage Effective Date is prior to 01/01/2005, the update will be blocked and message “Enrollment in Postdoc Plan May Not Be Prior to January 1, 2005 will be issued with a severity of Employee Reject in on-line and in batch.

**Dental**

If Assigned BELI (EDB 0360) is ‘P’ and previous Assigned BELI is ‘P’, the only values allowed in the Dental Plan (EDB 0272) and the Future Dental Plan Codes are ‘P3’ and ‘P4’.

If XX (opt out) is entered, the update will be rejected and messages will be issued from USER08 and USER12 with the text “MAY NOT OPT OUT OF POSTDOC PLANS – USE END DATE”. The messages will have a severity of ‘Employee Reject’ in on-line and batch. This edit will be triggered whenever the Assigned BELI or the Dental Plan Code is changed.

If XC (cancel) is entered, update will be rejected and messages will be issued from USER08 and USER12 with the text “DO NOT USE ‘XC’ TO CANCEL POSTDOC PLAN – USE END DATE”.


The messages will have a severity of ‘Employee Reject’ in on-line and batch. This edit will be triggered whenever the Assigned BELI or the Dental Plan Code is changed.

If any other value is entered, the update will be rejected and messages will be issued from USER08 and USER12 with the text “BELI ‘P’ – DENTAL PLAN MUST BE A POSTDOC PLAN”. The messages will have a severity of “Employee Reject” in on-line and batch. This edit will be triggered whenever the Assigned BELI or the Dental Plan Code is changed.

Note that a value of ‘XD’ is derived upon non-payment of premiums, and this value will still be supported.

In addition, if the assigned BELI is ‘P’ and the Dental Plan Code is ‘P3’ or ‘P4’, and the corresponding Plan Coverage Effective Date is prior to 01/01/2005, the update will be blocked and message “Enrollment in Postdoc Plan May Not Be Prior to January 1, 2005 will be issued with a severity of Employee Reject in on-line and in batch.

**Vision**

If Assigned BELI (EDB 0360) is ‘P’ and previous Assigned BELI is ‘P’, the only value allowed in the Vision Plan Code (EDB 0347) and the Future Vision Plan Code is ‘P5’.

If XX (opt out) is entered, the update will be rejected and messages will be issued from USER08 and USER12 with the text “MAY NOT OPT OUT OF POSTDOC PLANS – USE END DATE”. The messages will have a severity of ‘Employee Reject’ in on-line and batch. This edit will be triggered whenever the Assigned BELI or the Vision Plan Code is changed.

XC is not a valid value for the vision pan code, so existing range/value edits can be used to prevent this value.

In addition, if the assigned BELI is ‘P’ and the Vision Plan Code is ‘P5’, and the corresponding Plan Coverage Effective Date is prior to 01/01/2005, the update will be blocked and message “Enrollment in Postdoc Plan May Not Be Prior to January 1, 2005 will be issued with a severity of Employee Reject in on-line and in batch.

**PPEG635**

This module will be developed to prevent a non-postdoc individual from enrolling into the Postdoc Supplemental Disability Insurance.

If the Assigned BELI is not ‘P’ and the previous Assigned BELI is ‘P’, the G-balance (635) and Effective Date will be initialized.

If the Assigned is not ‘P’ and the previous Assigned BELI is not ‘P’, and if an attempt is made to establish a g-balance for GTN 635, the update to the GTN will be blocked, and message “PBSP Suppl Disability Not
Valid Unless BELI is ‘P’” will be issued with a severity of Employee Reject in on-line and Data Override in batch.
Program Changes

PPCB01

Temporary code will be placed in this module as follows:

If Monthly Maintenance to begin December is true, and the title code is ‘3252’, 3253, or ‘3254’, the Rederive BELI Flag will be set to a value of ‘Y’.

PPEC102

Note that this module executes in the post-update process (USER12) only, and performs the Medical Insurance edits.

This module will be modified as follows:

- If the Assigned BELI is not ‘P’ and the previous Assigned BELI is not ‘P’, enrollment in ‘P1’ or ‘P2’ will not be allowed. Thus, this module will be modified such that message 08-631 (BELI NOT ‘P’ – NOT ELIGIBLE FOR POSTDOC MEDICAL) will be issued if the BELI is not ‘P’ and the Medical Plan Code is ‘P1’ or ‘P2’.

- Currently, if the employee is newly-hired and the PIE is not prior to the actual current date, the employee will be enrolled to the ‘DM’ medical plan. If the employee is not a new-hire and the PIE has past, the employee will be enrolled in the default medical plan of ‘CM’.

  Logic will be modified such that if the BELI is ‘P’ and the PIE is prior to the actual current date, the postdoctoral scholar will not be enrolled in the default medical plan of ‘CM’.

- Currently, if the BELI value is less than 5 and the medical coverage effective date is blank, the medical coverage effective date will be set to the BELI Effective Date (EDB 0341) or the Hire Date (EDB 113).

  The BELI value of ‘P’ will be added to the existing condition “If BELI is less than ‘5’”.

PPEC103

This module performs consistency edits on AD&D Insurance data.

- Currently, if the BELI is greater than ‘4’, the employee is blocked from enrolling in AD&D Insurance.

  The BELI of ‘P’ will be included in the existing conditions that causes the update to be blocked and message 08-003 “AD&D DATA IS INCONSISTENT WITH ASSIGNED BELI” to be issued.

PPEC104

This module performs consistency edits on Supplemental Life Insurance data.
Currently, if the BELI is greater than ‘4’, the employee is blocked from enrolling in Supplemental Life Insurance.

The BELI of ‘P’ will be included in the existing conditions that cause the update to be blocked and message 08-088 “SUPPLEMENTAL LIFE INS DATA IS INCONSISTENT WITH ASSIGNED BELI” to be issued.

PPEC105

This module performs consistency edits on Dependent Life Insurance data.

Currently, if the BELI is greater than ‘4’, the employee is blocked from enrolling in Dependent Life Insurance.

The BELI of ‘P’ will be included in the existing condition that causes the update to be blocked and message 08-169 “DEPENDENT LIFE INS DATA IS INCONSISTENT WITH ASSIGNED BELI” to be issued.

PPEC106

This module performs consistency edits on Supplemental Disability Insurance data.

Currently, if the BELI is greater than ‘1’, the employee is blocked from enrolling in Supplemental Disability Insurance.

This module will be modified such that an attempt to enroll in Supplemental Disability is blocked when the BELI is equal to ‘P’, and new message 08-607 “BELI ‘P’ ELIG POSTDOC DISABILITY ONLY-USE GTN DEDUCTN” will be issued.

PPEC112

It noted that this module is executed in the pre-update (USER08) and post-update process (USER12).

Currently, PPEC112 performs Date of Employment consistency edits and derives the PIE (Period of Initial Eligibility) Date.

Currently, this module is triggered by a change to the Most Recent Hire Date (EDB 0113).

If the Most Recent Hire Date is not blank, the existing logic derives the PIE End Date (EDB 0751) as a date 30 calendar days (from System Parameter Entry 075) after the Most Recent Hire Date if either the Action Code is a value of ‘01’ or ‘02’ and the BELI is (‘1’, ‘2’, ‘3’, or ‘4’).

A value of ‘P’ will be added to the highlighted condition above that specifies BELI value of ‘1’, ‘2’, ‘3’, or ‘4’.

PPEC115

Note that this module executes in the post-update process (USER12) only.

Currently, PPEC115 performs the Dental Insurance edits.
This module will be modified as follows:

- If the Assigned BELI is not ‘P’, enrollment in ‘P3’ or ‘P4’ should not be allowed. Thus, this module will be modified such that message 08-632 (BELI NOT ‘P’ – NOT ELIGIBLE FOR POSTDOC DENTAL) will be issued if the BELI is not ‘P’ and the Dental Plan Code is ‘P3’ or ‘P4’.

- Currently, if the employee is newly-hired or a re-hire, and the PIE Date is not prior to the actual current date, the employee will be enrolled to the ‘DD’ medical plan. If the employee is not a new-hire and the PIE has past, the employee will be enrolled in the default medical plan of ‘D1’.

  Logic will be modified such that if the BELI is ‘P’ and the PIE is prior to the actual current date, the postdoctoral scholar will not be enrolled in the default medical plan of ‘D1’.

PPEC120

Note that this module is executed in the post-update process (USER12) only.

Currently, PPEC120 performs the Vision Insurance edits.

This module will be modified as follows:

- If the Assigned BELI is not ‘P’, enrollment in ‘P5’ should not be allowed. Thus, this module will be modified such that message 08-633 (BELI NOT ‘P’ – NOT ELIGIBLE FOR POSTDOC VISION) will be issued if the BELI is not ‘P’ and the Vision Plan Code is ‘P5’.

- Currently, if the employee is newly-hired or a re-hire, and the PIE Date is not prior to the actual current date, the employee will be enrolled to the ‘DV’ medical plan. If the employee is not a new-hire and the PIE has past, the employee will be enrolled in the default medical plan of ‘VI’.

  Logic will be modified such that if the BELI is ‘P’ and the PIE is prior to the actual current date, the postdoctoral scholar will not be enrolled in the default medical plan of ‘DV’.

PPEC133

Currently, PPEC133 performs the Medical Consistency edits.

This module will be modified as follows:

- If the Assigned BELI is not ‘P’ and the previous Assigned BELI is not ‘P’, enrollment in ‘P1’ or ‘P2’ will not be allowed. Thus, this module will be modified such that message 08-631 (BELI NOT ‘P’ – NOT ELIGIBLE FOR POSTDOC MEDICAL) will be issued if the BELI is not ‘P’ and the Medical Plan Code is ‘P1’ or ‘P2’.

PPEC134

Currently, PPEC134 performs the Dental Consistency edits.

This module will be modified as follows:

- If the Assigned BELI is not ‘P’ and the previous Assigned BELI is not ‘P’, enrollment in ‘P3’ or ‘P4’ will not be allowed. Thus, this module will be modified such that message 08-632 (BELI NOT ‘P’ –
NOT ELIGIBLE FOR POSTDOC DENTAL) will be issued if the BELI is not ‘P’ and the Dental Plan Code is ‘P3’ or ‘P4’.

PPEC135

Currently, PPEC135 performs the Vision Consistency edits.

This module will be modified as follows:

- If the Assigned BELI is not ‘P’ and the previous Assigned BELI is not ‘P’, enrollment in ‘P5’ will not be allowed. Thus, this module will be modified such that message 08-633 (BELI NOT ‘P’ – NOT ELIGIBLE FOR POSTDOC VISION) will be issued if the BELI is not ‘P’ and the Vision Plan Code is ‘P5’.

PPEC151

Currently, this module does consistency edits for Future Medical Plan data.

This module will be modified as follows:

- Currently, message 08-095 (CONTRIBUTION BASE REQUIRED FOR MEDICAL ENROLLMENT-UPDATE BLOCKED) is issued when the following conditions are satisfied:
  - Future Medical Plan Code (EDB 0680) is not ‘XX’, ‘XC’, ‘XD’, or blank and,
  - Medical Contribution Base (MCB) is equal to zero.

  The first condition above will be modified to include Future Medical Plan Codes of ‘P1’ and ‘P2’. This will prevent the issuance of message 08-095 when the Future Medical Plan Code is ‘P1’ or ‘P2’.

- Message 08-631 (BELI NOT ‘P’ – NOT ELIGIBLE FOR POSTDOC MEDICAL) will be issued if the BELI is not ‘P’ and the Future Medical Plan Code is ‘P1’ or ‘P2’.

- Message 08-642 (BELI ‘P’ - MEDICAL PLAN MUST BE A POSTDOC PLAN) will be issued if the BELI is ‘P’ and the Future Medical Plan Code is not ‘P1’ or ‘P2’.

- If the assigned BELI is ‘P’ and the Future Medical Plan Code is ‘P1’ or ‘P2’, and the corresponding Future Plan Coverage Effective Date is prior to 01/01/2005, the update will be blocked and message 08-634 (Enrollment in Postdoc Plan May Not Be Prior to January 1, 2005) will be issued with a severity of Employee Reject in on-line and in batch.

PPEC152

Currently, this module does consistency edits for Future Dental Plan data.

This module will be modified as follows:

- Message 08-632 (BELI NOT ‘P’ – NOT ELIGIBLE FOR POSTDOC DENTAL) will be issued if the BELI is not ‘P’ and the Future Dental Plan Code is ‘P3’ or ‘P4’.

- Message 08-643 (BELI ‘P’ – DENTAL PLAN MUST BE A POSTDOC PLAN) will be issued if the BELI is ‘P’ and the Future Dental Plan Code is not ‘P3’ or ‘P4’.
• If the assigned BELI is ‘P’ and the Future Dental Plan Code is ‘P3’ or ‘P4’, and the corresponding Future Plan Coverage Effective Date is prior to 01/01/2005, the update will be blocked and message 08-634 (Enrollment in Postdoc Plan May Not Be Prior to January 1, 2005) will be issued with a severity of Employee Reject in on-line and in batch.

PPEC153

Currently, this module does consistency edits for Future Dental Plan data.

This module will be modified as follows:

• Message 08-633 (BELI NOT ‘P’ – NOT ELIGIBLE FOR POSTDOC VISION) will be issued if the BELI is not ‘P’ and the Future Vision Plan Code is ‘P5’.

• Message 08-644 (BELI ‘P’ – VISION PLAN MUST BE A POSTDOC PLAN) will be issued if the BELI is ‘P’ and the Future Vision Plan Code is not ‘P5’.

• If the assigned BELI is ‘P’ and the Future Vision Plan Code is ‘P5’, and the corresponding Future Plan Coverage Effective Date is prior to 01/01/2005, the update will be blocked and message 08-634 (Enrollment in Postdoc Plan May Not Be Prior to January 1, 2005) will be issued with a severity of Employee Reject in on-line and in batch.

PPEC155

Currently, this module does consistency edits between current Medical Plan and Medical Contribution Base.

Message 08-095 (CONTRIBUTION BASE REQUIRED FOR MEDICAL ENROLLMENT-UPDATE BLOCKED) is issued when the following conditions are satisfied:

• Future Medical Plan Code (EDB 0680) is not ‘XX’, ‘XC’, ‘XD’, or blank and,
• Medical Contribution Base (MCB) is equal to zero.

The first condition above will be modified to include Future Medical Plan Codes of ‘P1’ and ‘P2’. This will prevent the issuance of message 08-095 when the Future Medical Plan Code is ‘P1’ or ‘P2’.

PPEG335

This module performs Dependent Care Gross-to-Net consistency edits.

The BELI of ‘P’ will be included in the existing conditions that cause the Dependent Care update to be blocked and message 08-308 “DEPCARE ENROLLMENT BLOCKED DUE TO BELI INELIGIBILITY” to be issued.

PPEG338

This module performs Health Care Reimbursement Account (HCRA) consistency edits.

The BELI of ‘P’ will be included in the existing conditions that cause the Health Care Reimbursement Account update to be blocked and message 08-339 “BELI INELIGIBLE FOR HCRA ENROLLMENT” to be issued.
Currently, PPEI199 performs benefits de-enrollment of the appropriate benefit(s). The appropriate suspended balance

Release 1556 incorrectly changed the hard-coded Working Storage GTN number with a value of 065 (Delta Dental – D1) to a value of ‘117’ which is only defined for Davis; the other campuses references the GTN number of 065 for Delta Dental.

The hard-coded Working Storage GTN number with a value of 117 (Dental Delta – D1) will be changed to a value of ‘065’.

PPEI204

It noted that this module is executed in the pre-update (USER08) and post-update process (USER12).

Currently, if the BELI (EDB 0360) has changed, PPEI204 sets the following BELI related dates:

- Benefits Eligibility Change Date (EDB 0183) is set to the SCR Current Date.
- BELI Eligibility Date (EDB 0361) is set to the first day of the month (from SCR Current Date) when the changed BELI confers greater benefits eligibility than the prior Assigned BELI, and is not related to a new hire or rehire action code.

The above conditions will be modified such that the BELI Eligibility Date will also be set to the first day of the month when the BELI is equal to ‘P’, regardless of the prior Assigned BELI.

In addition, if the BELI (EDB 0360) has changed causing greater benefits eligibility, the PIE (Period of Initial Eligibility) End Date is derived if the following conditions are satisfied:

- Action Code is not related to a new hire (01) or rehire (02),
- The changed BELI is not ‘2’ and prior Assigned BELI is not ‘3’

Currently, the PIE is calculated as follows:

Benefits Eligibility Effective Date (EDB 0341) is converted to a corresponding Lilian Date.
PIE End Date = Value in System Parameter Entry 075 + Lilian Date.

The conditions that determine whether the PIE should be derived will be modified such that a PIE will also be derived when the BELI is equal to ‘P’, regardless of the prior Assigned BELI. In addition, a PIE will be derived when the Assigned BELI is changed from a ‘P’ to ‘1’.

PPEI206

It is note that PPEM005 updates Total-Hours-Toward-Benefits Eligibility during Monthly Periodic Maintenance. It can indicate that an employee has achieved the necessary hours by setting HRS-BEN-ELIG-ACHIEVED to true. This flag is used in PPEI205 and passed to PPICRET for consideration in Retirement and FICA derivation. Based on the results, HRS-BEN-UCRP-ENROLLED can be set to true. This is then considered in this module to determine if enrollment should occur. Enrollment into the default medical, dental, and vision plans, setting of BELI related dates, and the establishment of new PIE do not occur if the BELI (EDB 0360) is already 1.
This module will be modified as follows:

- If the Assigned BELI is equal to ‘P’, enrollment into the default medical, dental, and vision plans, setting of BELI related dates, and the establishment of new PIE will not occur.

- If the Assigned BELI is equal to ‘P’, the Assigned BELI will not be changed to ‘1’.

**PPEI320**

This module is performed in the Daily and Monthly EDB Maintenance Process.

Currently, if this module is called during EDB monthly maintenance, all PPA records are deleted and the Suspended Premium Indicator is set to blank when the Separation Date (EDB 0140) is equal to or earlier than the Three Months Prior Date. If the Separation Date is not equal to earlier than the Three Months Prior Date, then only those PPA records that have been processed by the compute (where Pending Premium Activity Flag equals ‘2’) are deleted.

Currently, if this module is called during EDB Daily Maintenance, and the medical, dental or vision plan codes have ‘placeholder’ values of ‘DM’, ‘DD’, and ‘DV’ respectively, and the PIE End Date is prior to today’s date or the Separation Date (EDB 0140) is prior to today’s date, then the default plan codes in the PPA records and current plan codes are changed to the corresponding core benefit plan code, i.e. the medical plan code is changed from ‘DM’ to ‘CM’, the dental plan code is changed from ‘DD’ to ‘D1’ and the vision plan code is changed from ‘DV’ to ‘VI’. If the plan code is changed, then the Suspended Premium Indicator value is changed to ‘Y’ and corresponding PPA plan code value, PPA coverage value, and Pending Premium Activity Flag (set to ‘1’ for compute to process) are also updated.

It is noted that the Daily Run Date is set equal to the actual date. However, if the current hour is equal to or past the Current Cutoff hour value (stored in copymember CPWSXIDC), the Daily Run Date is set to tomorrow’s date. In addition, the derived Daily Run PIE Date is calculated by subtracting 2 days from the Daily Run Date.

The EDB Daily Maintenance Process will be changed as follows:

If the BELI is equal to ‘P’, and the Separation Date is prior to the Daily Run Date, or the PIE End Date is prior to the Daily Run PIE Date, the Medical Plan code of ‘DM’, Dental Plan Code of ‘DD’, Vision Plan Code of ‘DV’ (EDB 0292, 0272, 0347), Coverage Codes (EDB 0293, 0273, 0348), Plan Effective Dates (EDB 0294, 0274, 0349), and the Employee Plan Coverage Effective Dates (EDB 0454, 0455, 0456) will be initialized. Any PPA rows generated will also be initialized.

**PPEI330**

Currently, this module derives the Medical Coverage End Date, Dental Coverage End Date, Vision Coverage End Date, and Legal Coverage End Date when an employee separates.

This module will be modified as follows:

- If the medical, dental, and vision plans are ‘DM’ ‘DD’, and ‘DV’ respectively, end dates will not be set.

**PPEI340**
Currently, this module derives the Medical Coverage End Date, Dental Coverage End Date, Vision Coverage End Date, and Legal Coverage End Date when a change in the employee’s BELI causes ineligibility. For example, the employee’s Medical Coverage End Date is set equal to the last day of the current month when a change to the BELI value makes the employee ineligible for benefits.

This module will be modified as follows:

- If the medical, dental, and vision plans are ‘DM’ ‘DD’, and ‘DV’ respectively, end dates will not be set.

- To determine whether the Assigned BELI is changing from a ‘1’, ‘2’, ‘3’, or ‘4’ to a ‘P’ or from a ‘P’ to any other value, a (To-Postdoc-Benefits) flag will be set when Assigned BELI is changing from ‘1’, ‘2’, ‘3’, or ‘4’ to a ‘P’. If the Assigned BELI is changing from a ‘P’ to any value, the (To-Non-Postdoc-Benefits) flag will be set.

- If the To-Non-Postdoc-Benefits flag is true

  If the Medical Plan Code (EDB 0292) is ‘P1’ or ‘P2’, the Medical Coverage End Date (EDB 0300) will be set to the last day of the current month, except if there is an existing Medical Coverage End Date that is prior to the last day of the current month. In that case, the existing Medical Coverage End Date will be retained. Note that no logic changes are required; existing logic already are in place.

  If the Dental Plan Code (EDB 0272) is ‘P3’ or ‘P4’, the Dental Coverage End Date (EDB 0271) will set to the last day of the current month, except if there is an existing Dental Coverage End Date that is prior to the last day of the current month. In that case, the existing Dental Coverage End Date will be retained. Note that no logic changes are required; existing logic already in place.

  If the Vision Plan Code (EDB 0347) is ‘P5’, the Vision Coverage End Date (EDB 0346) will be set to the last day of the current month, except if there is an existing Vision Coverage End Date that is prior to the last day of the current month. In that case, the existing Vision Coverage End Date will be retained. Note that no logic changes are required; existing logic already are in place.

- Any future enrollments in postdoc medical, dental, or vision plans will be initialized.

- If the To-Postdoc-Benefits flag is true

  The Medical Coverage End Date (EDB 0300) will be set to the last day of the current month, except if there is an existing Medical Coverage End Date that is prior to the last day of the current month. In that case, the existing Medical Coverage End Date will be retained. Note that no logic changes are required; existing logic already are in place.

  If the Dental Coverage End Date (EDB 0271) will set to the last day of the current month, except if there is an existing Dental Coverage End Date that is prior to the last day of the current month. In that case, the existing Dental Coverage End Date will be retained. Note that no logic changes are required; existing logic already are in place.

  If the Vision Coverage End Date (EDB 0346) will be set to the last day of the current month, except if there is an existing Vision Coverage End Date that is prior to the last day of the current month. In that case, the existing Vision Coverage End Date will be retained. Note that no logic changes are required; existing logic already are in place.

- Any future enrollments in non-postdoc medical, dental, or vision plans will be initialized.
Due to timing issues related to the processing of X1 transactions produced from the one-time program PPO1607A to set the Postdoctoral Scholars’ Assigned BELI to ‘P’, and the changing of the BELI value in on-line EDB Maintenance before December 1st, temporary code will be added to the module as follows:

If the Assigned BELI is ‘P’ and the Assigned BELI is not equal to the previous Assigned BELI value, and the Health Coverage End Date is ‘2004-11-30’, the Health Coverage End Date will be set to ‘2004-12-31’.

If the Assigned BELI is ‘P’ and the Assigned BELI is not equal to the previous Assigned BELI value, and the Dental Coverage End Date is ‘2004-11-30’, the Dental Coverage End Date will be set to ‘2004-12-31’.

If the Assigned BELI is ‘P’ and the Assigned BELI is not equal to the previous Assigned BELI value, and the Vision Coverage End Date is ‘2004-11-30’, the Vision Coverage End Date will be set to ‘2004-12-31’.

PPEM111

Currently, this module is triggered in the Monthly EDB File Maintenance and regular EDB File Maintenance Processes. PPEM111 calls PPPBELI for benefits eligibility processing. PPPBELI derives an employee's Benefits Eligibility Level Indicator (Derived BELI) (EDB 0375) and returns the value to PPEM111.

PPEM111 will be modified as follows:

The following edits will be placed after the Benefits Eligibility Level Indicator has been derived by PPPBELI.

- An edit will be added to determine whether the Assigned BELI (EDB 0360) is set to any value other than ‘P’ and the Derived BELI (EDB 0375) is ‘P’. If the Assigned BELI is changed to a value other than ‘P’, message 08-606 “ASSIGNED BELI SHOULD BE ‘P’ WITH POSTDOC APPOINTMENTS” will be issued with a severity of WARNING in on-line and in batch.

- An edit will be added to check the Assigned BELI when the Derived BELI is changed to ‘P’. If the Derived BELI is ‘P’ and the Assigned BELI is not ‘P’, message 08-605 “DERIVED BELI SET TO ‘P’ – ASSIGNED BELI SHOULD BE ‘P’” will be issued with a severity of WARNING in on-line and batch.

- If the Assigned BELI is ‘P’ and the Derived BELI is not ‘P’, the BELI Conflict Date will be set equal to the SCR Current Date.

- If the Assigned BELI is any other value and the Derived BELI is the Derived BELI is ‘P’, the BELI Conflict Date will be set equal to the SCR Current Date.

PPEM113

Similar to assigning a BELI numeric value of ‘5’ to the BELI-NUMERIC-VALUE field for a BELI value of ‘?’, a BELI numeric value of ‘9’ will be assigned to the BELI-NUMERIC-VALUE field when the BELI value is ‘P’.
This module will be modified as follows:

Postdoctoral scholars who have only postdoc appointments will be treated the same as other employees who have ineligible appointments (such as perdiem and floater); the retirement code will not will be set to ‘U’. If the individual does have a non-postdoc appointment, the derivation into retirement ‘U’ will occur.

Note that the logic that sets the Assigned BELI to ‘1’ when 1000-hours or 750-hours is achieved is in PPEI206.

Currently, PPWEINS is the screen detail processor for function EINS.

Due to the Postdoc Supplemental Disability GTN and the Employee Supplemental Disability (formerly EPD) GTN having a Benefit Type of ‘Z’ on the GTN Table, the statement that performs section 2530-SELECT-GTN-NUMBER to obtain the GTN Number based on Benefit Type will be commented out. Instead the Employee Supplemental Disability GTN will be taken from copymember CPWSXIC2.

PPWIINP

PPWIINP is the screen processor for the Central Insurance EDB Inquiry function IINP. It calls the Medical, Dental, Vision and Legal BRT utility programs.

It will be modified to suppress the display of the employer contribution and employee deduction when the Assigned BELI is ‘P’.

Currently, PPWIINS is the screen processor for the Departmental Insurance EDB Inquiry function IIINS. It calls the Medical, Dental, Vision and Legal BRT utility programs.

It will be modified to suppress the display of the employer contribution and employee deduction when the Assigned BELI is ‘P’.
Resource Definition Operations (RDO)

The following modules will be added to the Program Processing Table:

PPEC165

PPEG635
System Control Table Updates

System Messages

Messages 08-665 and 12-665, which was release in Release 1605 contained a missed spelling. ‘PBSP’ should be spelled “PSBP”.

The message texts containing the acronym “PBSP” will be corrected to “PSBP” for 08-665 and 12-665.

System Parameter

New entries 189 and 190 to establish rates for Postdoc Life/AD&D and Postdoc Disability respectively will be added to the table.

Data Element

Valid Plan Codes of ‘P1’, ‘P2’, ‘P3’, ‘P4’, and ‘P5’ will be added to the existing data elements containing valid values related to medical, dental, and vision.

Valid value of ‘P’ will be added to the existing data element 360. In addition, a change in value to the Assigned BELI (EDB 0360) will trigger module PPEG635.

Gross-to-Net

GTN 225 (Dep Care) will made “Inactive”.

The following GTNs will be added to the GTN table:

GTN 635 - PSBP Supplemental Disability

GTN 625 – PSBP Medical Plan ‘P1’ (Deduction)
GTN 626 – PSBP Medical Plan ‘P2’ (Contribution)
GTN 627 – PSBP Medical Plan ‘P2’ (Deduction)
GTN 628 – PSBP Medical Plan ‘P2’ (Contribution)
GTN 631 – PSBP Dental Plan ‘P3’ (Deduction)
GTN 632 – PSBP Dental Plan ‘P3’ (contribution)
GTN 633 – PSBP Dental Plan ‘P4’ (Deduction)
GTN 634 – PSBP Dental Plan ‘P4’ (Contribution)
GTN 629 – PSBP Vision Plan ‘P5’ (Deduction)
GTN 630 – PSBP Vision Plan ‘P5’ (Contribution)

Processing Group

New module PPEC165 for the edits to PSBP medical, dental, and vision will be added to the Program IDs 08 and 12.
Routine Definition

New module PPEC165 will be defined in the Routine Definition table.

Obsoleted module PPEG225 will be removed from the Routine Definition table.

CICS Help

New plan code values of ‘P1’, ‘P2’, ‘P3’, ‘P4’, and ‘P5’ will be added to the appropriate CICS Help texts (See Attachments).
Obsolete Objects

The following object will be made obsolete. Campuses should follow local procedure for removing the obsolete object:

**COBOL Module**

PPEG225
Attachments

Attachment A – Data Dictionary Entries

Attachment B – One-time Reports
System Number:  EDB 0292

User Access Name:  0292-1

Programming Name:  HLTH_PLAN IN PPPBEN

Revision Date:  xx/xx/xx

Comments:
Location(s):  HBN 4532  - Medical Plan Code-HBN in HDB
             APS 0953  - Primary Health Plan Code
             BCS 0953  - Primary Health Plan Code
             CPS 0953  - Primary Health Plan Code
             IPS 0953  - Primary Health Plan Code
             OPP 0953  - Primary Health Plan Code

Name:  MEDICAL PLAN CODE-EDB

Type:  ALPHANUMERIC

Length:  2

Format:  N/A

General Description:
Code indicating the medical insurance plan in which the individual is enrolled.

Code Interpretation:
BC  - Blue Cross Plus
BH  - High Option (Blue Cross)
BP  - Blue Cross PPO
CM  - Core Major Medical (Blue Cross)
DH  - Definity Health (UCSF and UCSB only)
FP  - PacifiCare
HN  - Health Net
KN  - Kaiser North
KS  - Kaiser South
KU  - Kaiser Umbrella
KW  - Kaiser MidAtlantic
PN  - PacifiCare Nevada
P1  - PSBP Medical HMO
P2  - PSBP Medical PPO
SE  - UnitedHealthcare Select EPO
WH  - Western Health Advantage
DM  - Medical plan not yet selected by the employee
XX  - Opted out of medical
XC  - Cancelled medical
XD  - Deenrolled due to suspension of premiums

EDB 0292 -- MEDICAL INSURANCE PLAN CODE Previously Valid Codes
FN  - Foundation
HA  - Heals
HG  - FHP Health Care
NA  - PruNet
NH  - Blue Premier HMO New Mexico
PH  - Prudential High Option
UC  - UC Care
**System Number:**  EDB 0272  
**User Access Name:**  0272-2  
**Programming Name:**  DENTAL_PLAN IN PPPBEN  
**Revision Date:**  xx/xx/xx  

**Comments:**  
**Location(s):**  
- HBN 4520 – Dental Plan Code-HBN in HDB  
- BCS 125 – Dental Plan Code  
- CPS 125 – Dental Plan Code  
- IPS 125 – Dental Plan Code  
- OPP 125 – Dental Plan Code  

**Name:**  DENTAL PLAN CODE-EDB  
**Type:**  ALPHANUMERIC  
**Length:**  2  
**Format:**  N/A  

**General Description:**  
Code indicating the dental plan selected by the individual.  

**Code Interpretation:**  

- D1 - Delta Dental Service  
- D3 - PMI  
- P3 - PSBP Dental HMO  
- P4 - PSBP Dental PPO  
- DD - Dental plan not yet selected by the employee  
- XX - Opted out of dental  
- XC - Cancelled dental  
- XD - Deenrolled due to suspension of premiums  

Previous codes may be attached  
EDB 0272 - Dental Plan Code-EDB Codes deleted January 1995  

- D2 - Safeguard
Postdoc Benefits Modifications
Onetime Postdoc Open Enrollment Carrier File
November 15, 2004

System Number: EDB 0347
User Access Name: 0347-4
Programming Name: VIS_PLAN IN PPPBEN
Revision Date: xx/xx/xx

Comments:
Location(s): HBN 4545 - Optical Plan Code-HBN in HDB
APS 2495 - Optical Plan Code
BCS 2495 - Optical Plan Code
CPS 2495 - Optical Plan Code
IPS 2495 - Optical Plan Code
OPP 2495 - Optical Plan Code

Name: VISION PLAN CODE-EDB
Type: ALPHANUMERIC
Length: 2
Format: N/A

General Description:
Code indicating the vision insurance plan selected by the individual.

Code Interpretation:
DV - Vision plan not yet selected by the employee
VI - Vision Care
P5 - PSBP Vision Plan
XX - Opted out of vision
XD - Deenrolled due to suspension of premiums
Postdoc Benefits Modifications
Onetime Postdoc Open Enrollment Carrier File
November 15, 2004

System Number: EDB 0680

User Access Name: 0680-4

Programming Name: FCB_HEALTH_PLAN IN PPPFCB

Revision Date: xx/xx/xx

Comments:

Location(s):

Name: FUTURE MEDICAL PLAN CODE

Type: ALPHANUMERIC

Length: 2

Format: N/A

General Description:
Code indicating the future medical insurance plan in which the individual will be enrolled.

Code Interpretation:

BC - Blue Cross Plus
BH - High Option (Blue Cross)
BP - Blue Cross PPO
CM - Core Major Medical (Blue Cross)
DH - Definity Health (UCSF and UCSB only)
FP - PacifiCare
HN - Health Net
KN - Kaiser North
KS - Kaiser South
KU - Kaiser Umbrella
KW - Kaiser MidAtlantic
PN - PacifiCare Nevada
P1 - PSBP Medical HMO
P2 - PSBP Medical PPO
SE - UnitedHealthcare Select EPO
WH - Western Health Advantage
DM - Medical plan not yet selected by the employee
XX - Opted out of medical
XC - Cancelled medical
XD - Deenrolled due to suspension of premiums

EDB 0680 -- FUTURE MEDICAL INSURANCE PLAN CODE Previously Valid Codes

FN - Foundation
HA - Heals
HG - FHP Health Care
NA - PruNet
NH - Blue Premier HMO New Mexico
PH - Prudential High Option
UC - UC Care
System Number: EDB 0683
User Access Name: 0683-7
Programming Name: FCB_DENTAL_PLAN IN PPPFCB
Revision Date: xx/xx/xx

Comments:
Location(s):

Name: FUTURE DENTAL PLAN CODE
Type: ALPHANUMERIC
Length: 2

Format: N/A

General Description:
Code indicating the future dental plan in which the individual will be enrolled.

Code Interpretation:
D1 - Delta Dental Service
D3 - PMI
P3 - PSBP Dental HMO
P4 - PSBP Dental PPO
XX - Opted out of dental
XC - Cancelled dental
XD - Deenrolled due to suspension of premiums
System Number: EDB 0686
User Access Name: 0686-0
Programming Name: FCB_VISION_PLAN IN PPPFCB
Revision Date: xx/xx/xx

Comments:
Location(s):

Name: FUTURE VISION PLAN CODE
Type: ALPHANUMERIC
Length: 2

Format:
N/A

General Description:
Code indicating the future vision plan in which the individual will be enrolled.

Code Interpretation:
VI - Vision Care
PS - PSBP Vision Plan
XX - Opted out of vision
XD - Deenrolled due to suspension of premiums
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TOTAL X1 TRANSACTIONS 13
### Attachment B-2

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