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Re:	Release:	1607
	Service Request:	16935, 81049
	Error Reports:	1939
	Programs:	PPCB01, PPEC102, PPEC103, PPEC104, PPEC105, PPEC106, PPEC112, PPEC115, PPEC120, PPEC133, PPEC134, PPEC135, PPEC151, PPEC152, PPEC153, PPEC155, PPEC165 (new), PPEG335, PPEG338, PPEG635 (new), PPEI199, PPEI204, PPEI206, PPEI320, PPEI330, PPEI340, PPEM111, PPEM113, PPFICRET, PPPBELI, PPWEINS, PPWIINP, PPWIINS, PPO1607A (one-time), PPO1607B (one-time)
	Copymembers:	None
	Include Members:	None
	DDL Members:	None
	Bind Members:	PPO1607A, PPO1607B
	CICS Maps:	None
	Forms:	None
	Table Updates:	System Messages Table, System Parameter Table, Gross-to-Net Table, Data Element-Table, Table, Processing Group Table, Routine Definition Table, CICS Help
	Urgency:	Date-Mandated (see Timing of Installation)

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 (Phase 2 of Postdoctoral Scholar changes) 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.

The third release will contain modifications to the compute, Consolidated Billing, Self Billing Statements, and the monthly Carrier File reporting. In addition, PPP690 is changed for W4 Exempt reporting.

The fourth release will contain modifications to the Expense Distribution process.

This release addresses the following service requests and Error Report:

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.
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

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, 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 between 01/01/2005 and 01/31/2005 should be derived.

Error Report 1939

Release 1556 inadvertently changed the GTN number value from 065 to 117 (Delta Dental) that is defined in working storage section of module PPEI199. It is noted that Davis is the only campus assigned a GTN value of 117 for Delta Dental. The other campuses are assigned a GTN number value of 065 for Delta Dental.

Thus, the GTN number should be changed from 117 to 065 in the working storage section. Davis should retain the GTN number of 117 in working storage as a local change.

Programs

PPCB01

The following temporary code has been placed in this module:

> 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

This module has been modified as follows:

• Message 12-631 (BELI NOT 'P' – NOT ELIGIBLE FOR POSTDOC MEDICAL) is issued if the BELI is not 'P' and the Medical Plan Code is 'P1' or 'P2'.

• 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'.

• The BELI value of 'P' has been included in the existing condition "If BELI is less than '5'".

PPEC103

This module has been modified as follows:

> The BELI of 'P' is 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 has been modified as follows:

The BELI of 'P' is 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 has been modified as follows:

The BELI of 'P' is 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 has been modified as follows:

An attempt to enroll in Supplemental Disability is blocked when the BELI is equal to 'P'. New message 08-607 "BELI 'P' ELIG POSTDOC DISABILITY ONLY-USE GTN DEDUCTN" is issued.

PPEC112

This module has been modified as follows:

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' is added to the highlighted condition above that specifies BELI value of '1', '2', '3', or '4'.

PPEC115

This module has been modified as follows:

- Message 12-632 (BELI NOT 'P' – NOT ELIGIBLE FOR POSTDOC DENTAL) is issued when the BELI is not 'P' and the Dental Plan Code is 'P3' or 'P4'.

- If the BELI is 'P' and the PIE is prior to the actual current date, the postdoctoral scholar is not be enrolled in the default medical plan of 'D1'.

PPEC120

This module has been modified as follows:

- Message 12-633 (BELI NOT 'P' – NOT ELIGIBLE FOR POSTDOC VISION) is issued when the BELI is not 'P' and the Vision Plan Code is 'P5'.

- If the BELI is 'P' and the PIE is prior to the actual current date, the postdoctoral scholar is not be enrolled in the medical plan of 'DV'.

PPEC133

This module is modified as follows:

Message 08-631 (BELI NOT 'P' – NOT ELIGIBLE FOR POSTDOC MEDICAL) is issued when the BELI is not 'P' and the Medical Plan Code is 'P1' or 'P2'.

PPEC134

This module is modified as follows:

> Message 08-632 (BELI NOT 'P' – NOT ELIGIBLE FOR POSTDOC DENTAL) is issued when the BELI is not 'P' and the Dental Plan Code is 'P3' or 'P4'.

PPEC135

This module is modified as follows:

> Message 08-633 (BELI NOT 'P' – NOT ELIGIBLE FOR POSTDOC VISION) is issued when the BELI is not 'P' and the Vision Plan Code is 'P5'.

PPEC151

This module is modified as follows:

- The Future Medical Plan Codes of 'P1' and 'P2' are included in the existing conditions to prevent the issuance of message 08-095 (CONTRIBUTION BASE REQUIRED FOR MEDICAL ENROLLMENT-UPDATE BLOCKED).

- Message 08-631 (BELI NOT 'P' – NOT ELIGIBLE FOR POSTDOC MEDICAL) is issued when 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) is issued when 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 is blocked and message 08-634 (Enrollment in Postdoc Plan May Not Be Prior to January 1, 2005) is issued.

PPEC152

This module is modified as follows:

- Message 08-632 (BELI NOT 'P' – NOT ELIGIBLE FOR POSTDOC DENTAL) is issued when 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) is issued when 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 is blocked and message 08-634 (Enrollment in Postdoc Plan May Not Be Prior to January 1, 2005) is issued.

PPEC153

This module is modified as follows:

- Message 08-633 (BELI NOT 'P' – NOT ELIGIBLE FOR POSTDOC VISION) is issued when 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) is issued when 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 is blocked and message 08-634 (Enrollment in Postdoc Plan May Not Be Prior to January 1, 2005) is issued.

PPEC155

This module is modified as follows:

The Future Medical Plan Codes of 'P1' and 'P2' are included in the existing conditions to prevent the issuance of message 08-095 (CONTRIBUTION BASE REQUIRED FOR MEDICAL ENROLLMENT-UPDATE BLOCKED).

PPEC165

This module is developed to edit postdoc consistency on postdoc benefits.

If Assigned BELI (EDB 0360) is 'P' and previous Assigned BELI is 'P', the only values that are allowed for the Medical Plan Codes (EDB 0292) are 'P1' and 'P2'. The only values allowed in the Dental Plan (EDB 0272) Codes are 'P3' and 'P4'. The only value allowed in the Vision Plan Code (EDB 0347) and the Future Vision Plan Code is 'P5'.

PPEG335

The BELI of 'P' is 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" is issued.

PPEG338

The BELI of 'P' is 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.

PPEG635

This module has been developed to prevent a non-postdoc individual from enrolling into the Postdoc Supplemental Disability Insurance. Message 08-665 "PSBP SUPPL DISABILITY NOT VALID UNLESS BELI IS "P"" is issued.

PPEI199

The modification to this module addresses the error report in Error Report 1939.

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 (Delta Dental – D1) has been changed to a value of '065'. Davis should retain the GTN value of 117 as a local change.

PPEI204

This module has been modified as follows:

- If the BELI (EDB 0360) has changed, BELI Eligibility Date is set to the first day of the month when the BELI is equal to 'P.

- If the BELI (EDB 0360) has changed causing greater benefits eligibility, the PIE (Period of Eligibility) is derived when the BELI is equal to 'P', regardless of the prior Assigned BELI.

PPEI206

This module has been 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 are bypassed.

- If the Assigned BELI is equal to 'P', the Assigned BELI is not changed to '1'.

PPEI320

This module has been modified 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, Dental, Vision Plan Codes (EDB 0292, 0272, 0348), Coverage Codes (EDB 0293, 0273, 0348), Plan Effective Dates (EDB 0294, 0274, 0349), Plan Coverage End Dates (EDB 0300, 0271, 0346), and the Employee Plan Coverage Effective Dates (EDB 0454, 0455, 0456) are initialized. Any PPA rows generated are 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.

If the medical, dental, and vision plans are 'DM' 'DD', and 'DV' respectively, end dates are not set.

PPEI340

This module is modified such that the Medical Coverage End Date, Dental Coverage End Date, and Vision Coverage End Date are set equal to the last day of the current month when the Assigned BELI is changing from a '1', '2', '3', or '4' to a 'P' or from a 'P' to any other value.

In addition, 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 codes are 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 is 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 is 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 is set to '2004-12-31'.

PPEM111

This module has been modified as follows:

- An edit is added to determine whether the Assigned BELI (EDB 0360) is changed to any value other than 'P' when the Derived BELI (EDB 0375) is 'P'. If the Assigned BELI is changed to a value other than 'P', message 08-605 "ASSIGNED BELI SHOULD BE 'P' WITH POSTDOC APPOINTMENTS" is issued.

- An edit is 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 08-606 "DERIVED BELI SET TO 'P' – ASSIGNED BELI SHOULD BE 'P'" 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 is 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 is 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' is assigned to the BELI-NUMERIC-VALUE field when the BELI value is 'P'.

PPFICRET

This module has been modified as follows:

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

PPPBELI

Currently, temporary logic is placed, from Release 1605, to execute when the Monthly Maintenance to begin December is run.

The temporary code has been modified such that future postdoc appointments starting January 2, 2005 or later are not considered in the BELI derivation process.

PPWEINS

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 has been commented out. Instead the Employee Supplemental Disability GTN value is 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.

PPWIINP is modified to suppress the display of the employer contribution and employee deduction when the Assigned BELI is 'P'.

PPWIINS

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

PPWIINS is modified to suppress the display of the employer contribution and employee deduction when the Assigned BELI is 'P'.

PPO1607A

PPO1607A has been developed to set the postdoc scholar's Assigned BELI to 'P' if the Derived BELI is 'P'. The EDB is not updated directly; X1 transactions are produced containing the Assigned BELI value of 'P' and the BELI Effective Date of '010105'.

PPO1607B

PPO1607B has been developed to produce the Open Enrollment Carrier File containing postdoc related plans, similar to the monthly Carrier File produced by PPP560.

Bind Members

PPO1607A

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

PPO1607B

This Bind member contains bind statements for one-time program PPO1607B.

JCL Changes

JCL should be set up for one-time programs PPO1607A and PPO1607B. The test JCLs provided in this release can be used as a model.

Table Updates

System Messages Table

The spelling of "PSBP" in the message text of messages 08-665 and 12-665 have been corrected.

System Parameter Table

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

Data Element Table

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 Table

GTN numbers related to postdoc medical, dental, and vision plans will be added to the table. In addition, GTN 635 (Postdoc Supplemental Disability) will be added to the table.

Processing Group Table

New module PPEC165 is added to the table.

Routine Definition Table

New module PPEC165 is defined to the table.

<u>CICS Help</u>

New plan code values of 'P1', 'P2', 'P3', 'P4', and 'P5' are added to the appropriate CICS Help texts.

Test Plan

A separate Test Plan document is provided with this release.

Installation Instructions

A separate Installation Instructions document is provided with this release.

Timing of Installation

The installation of this release is Date-Mandated.

This release must be installed after all computes for November earnings are complete and immediately prior to Monthly Maintenance to begin December. The one-time PPO1607A must be run immediately after Monthly Maintenance to begin December has completed. The X1 transactions produced by the one-time must be immediately processed into the EDB File Maintenance process.

Enrollment of postdoctoral scholars into the postdoc benefit plans should take place as soon as the X1 transactions to set the Assigned BELI (EDB 0360) are posted, and prior to running the one-time PPO1607B to create the one-time carrier file for postdoc plans. The one-time PPO1607B that produces the open enrollment carrier file must be run after all ***Postdoctoral Scholar enrollments*** have been completed.

Refer to the installation instructions document for complete details.

As usual, campuses are encouraged to install this release in as timely a fashion as possible, and in the normal numeric sequence of releases.

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

Jackson Quan