February 16, 2005

BEATRICE CARDONA
HAI DOAN
RENATA ELLIS

MABEL LAI
BARBARA VANDEN BORRE

Re: Release: 1629
Service Request: 16933
Error Reports: None
Programs: PPP520
Copymembers: None
Include Members: None
DDL Members: None
Bind Members: None
CICS Maps: None
Forms: None
Table Updates: None
Urgency: Not Urgent (see Timing of Installation)

Service Request 16933

This release is a follow up to Postdoctoral Scholar (Postdoc) changes previously issued for the Expense Distribution Process and addresses Annuitant Health benefit eligibility as well as the subsequent transfer of the new Postdoc related payroll expenses.

First, it has been determined that payments which are neither Fellowship (Title Code 3253) nor Paid Direct (Title Code 3253) should be assessed the Annuitant Health benefit when they apply to Postdoc employees who are UCRS eligible (i.e., prior employment; Retirement Eligibility Code = U, B, or 1). Changes in this current release will initiate these assessments.

The second area of release modifications is associated with the transfer of Postdoc benefit expenses. When Expense Transfers are processed by PPP520, each of the eight combined PPP5302 benefit amounts must be separated into their detail benefit components for proper ledger reversal. For example, the “UI/GSH” benefit total must be separated into the Unemployment Insurance (UI) portion and the Graduate Student Health (GSH) portion. As per the Release 1615 implementation of Postdoc expense processing, three new Postdoc benefits were added while certain other standard benefits were deemed inapplicable to Postdoc individuals. Therefore, the routines that separate the affected benefit totals have been modified. The following PPP5302 benefit set totals, as entered for Expense Transfers, are affected by changes in this current release:

1. The new PSBP Broker Fee is reported in the same column as the “UI/GSH” benefit total and must be appropriately separated from the Unemployment Insurance portion and the Graduate Student Health portion.

2. The assessment of Employee Support (ESP) is not applicable to Postdoc individuals. Furthermore, Postdoc Title Codes are mutually exclusive of Graduate Student Partial Fee Remission II (GSPF2) eligible Title Codes. Therefore, the full amount of the reported “WC/ESP/GSPF2” benefit total must be assigned to
Workers’ Compensation (WC) whenever the transfer Title Code indicates a Postdoc individual (i.e., Title Codes 3252, 3253, & 3254).

3. The new PSBP Life/AD&D benefit as well as the new PSBP Disability benefit are reported in the same column as the “LIFE/UCDI/GSFR” benefit total and must be appropriately separated from the standard UC Paid Life Insurance (LI) and UC Paid Disability (UCDI) as well as Graduate Student Fee Remission (GSFR) portions.

4. The assessment of Annuitant Health is not applicable to Postdoc Fellows or Paid Directs and additionally, is not applicable to Postdoc Employees unless the employee is a UCRS member. Therefore, whenever the transfer Title Code indicates a Postdoc Fellow/Paid Direct or the Title Code indicates Postdoc Employee with a non-UCRS Retirement Eligibility Code, none of the “DENT/HLTH/ VIS/ANNU” benefit total will be assigned to the Annuitant Health portion. Note that the current base process as well as the release modified process does not attempt to separate the Dental, Health, or Vision; instead, that amount of the benefit total not assigned to the Annuitant portion is assigned to Health (i.e., the Vision and Dental are reversed back as Health).

Programs

PPP520

The assessment of Annuitant Health as issued in Postdoc Release 1615, bypassed individuals when their BELI value was ‘P’. The modifications in this current release will assess Annuitant Health for Postdoc individuals only when the individual is a UCRS member and the Title Code is neither 3253 (Fellow) nor 3254 (Paid Direct).

Additionally, program PPP520 has been modified to separate Expense Transfer benefits amounts into their individual component benefits as follows:

1. “UI/GSH” When the transfer’s Title Code indicates Postdoc Paid Direct (“3254”) or Fellowship (“3253”), the entire benefit total amount is assigned to the PSBP Broker Fee. Otherwise, the standard UI benefit amount is developed (Rate time Gross where rate determination is based on E1 FAU) and the difference between the calculated UI benefit and the benefit total is then either assigned to:
   - Graduate Student Health when the Title Code is GSH eligible,
   - PSBP Broker Fee when the Title Code is Postdoc Employee (“3252”),
   - Or, added to the UI benefit amount when the Title is neither GSH nor Postdoc eligible (i.e., the entire benefit amount is assigned to UI).

2. “WC/ESP/GSPF2” When the transfer’s Title Code indicates Postdoc Employee (“3252”), Paid Direct (“3254”) or Fellowship (“3253”), the entire benefit total amount is assigned to WC. Otherwise, the standard WC benefit amount is developed (Rate times Gross where rate determination is based on E1 FAU) and the difference between the calculated WC benefit and the benefit total is assigned to ESP unless the Title is GSPF2 eligible. When the Title Code is GSPF2 eligible the ESP benefit amount is developed (Rate times Gross where rate determination is based on E1 FAU) and the difference between the total of the calculated WC and ESP amounts and the benefit total is assigned to GSPF2.

3. “LIFE/UCDI/GSFR” When the transfer’s Title Code indicates Postdoc Employee (“3252”), Paid Direct (“3254”) or Fellowship (“3253”), the entire benefit total is split among the PSBP Life/AD&D benefit and the PSBP Disability benefit. The split methodology used is the ratio of the monthly PSPB Life/AD&D rate (System Parameter 189) to the monthly PSPB Disability rate (System Parameter 190). Otherwise (non-Postdoc Title), if the Title Code is GSFR eligible, the entire benefit total amount is assigned to GSFR. When the Title Code is neither Postdoc nor GSFR, the entire benefit is split among UC Paid Life and UC
Paid Disability (the split methodology used is the ratio of the monthly BRT UC Paid Life rate and the BRT UC Paid Disability rate.

4. “DENT/HLTH/ VIS/ANNU” When the transfer’s Title Code indicates Postdoc Paid Direct (“3254”) or Fellowship (“3253”) or the individual is not a UCRS member and the Title is Postdoc Employee (“3252”), the entire benefit total is assigned to Health. Otherwise (non-Postdoc Title), the Annuitant benefit portion is derived (Gross times System Parameter 126 Annuitant Rate) and the remainder is assigned to the Health benefit.

Test Plan

A complete test plan is provided with this release. Campuses are encouraged to use the base system test materials, as well as performing any other desired local tests.

Installation Instructions

1. Install the release modified COBOL member PPP520.
2. DB2 pre-compile, compile and link program PPP520 into Batch LOADLIB.
3. Bind the plan for program PPP520.
4. Perform the installation testing.
5. Install release object in production.

Timing of Installation

The installation of this release is Not Urgent.

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

If there are any questions, please send electronic mail to Jim.Tuohig@ucop.edu, or call (510)987-0741.

Jim Tuohig