UC HR/BENEFITS - INFORMATION SYSTEMS SUPPORT

SERVICE REQUEST
UIRC 1603SS (R 01/00)

DATE
08/16/10

DATE/CYCLE DUE

ESTIMATE REQUIRED

PERSON AUTHORIZING REQUEST: Michael O'Neill

SYSTEMS CONTACT: Kenneth Smith

DEPARTMENT: Human Resources

RECHARGE NO.: NR-HR

REQUESTOR: John Fox

SYSTEMS/FILE/PROGRAMS:
PAYROLL

RETRIEVAL/SYSTEM VERIFICATION (Description of Request):
Clearing Unused Furlough Hour Balances

PRODUCTION RUN

RETRIEVAL/PRODUCTION RUN

DISTRIBUTION/UPDATING INSTRUCTIONS: (DESCRIPTION OF WORK TO BE COMPLETED OR RESULTS OF WORK COMPLETED)

E&P & USE ONLY

COMMENTS

APPROVAL TO PROCEED

[Signature] 8/16/00

UC Office of the President
HRB Information Systems Support
SR83078
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SR83078 Requirements
Clearing Unused Furlough Balances

Objective:
Remove expired PTO balances related to the Fiscal Year 2009-2010 Salary Reductions and to the CUE Temporary Layoff Program.

Project Type:
PPS Program.

Requested by: John Fox, HR Policies

Analyst:
Business analyst: Ken Smith, Benefits Information Systems
Requirements analyst: Ken Smith, Benefits Information Systems

Urgency:
Not Urgent.

Implementation Deadline:
Following monthly maintenance to begin November, 2010.
**Background:**

At their July 15, 2009 meeting the Regents authorized a one-year salary reduction program effective with September 2009 through August 2010 earnings. Bargaining units that ratified participation in the salary reduction after September 2009 have a different twelve month period.

For example, the Librarians (LX) and UCSB Skilled Crafts (K8) period is October 2009 earnings through September 2010 earnings.

Release 1876 implemented a means to reduce employee salary by a specific percent, and Release 1877 implemented a means to accrue a corresponding number of furlough hours based on the number of hours worked.

In Release 1876 it was determined to use the existing PTO data elements to store furlough hours, and a one-time program was distributed to zero all PTO balances.

Furlough hours may only be used during the 12 month salary reduction period. Unused furlough hours are forfeited.
Current Process:
A new program distributed in Release 1877 is run after each compute or monthly processing to perform furlough hours accrual (separate from the regular compute) and create leave accrual transactions for processing in a subsequent compute. For the hours in each SRB (Salary Reduction Base) earnings distribution in the PAR, the program applies a leave accrual rate obtained from a “factor file” using the appointment title unit code and the employee MCB as indexes. The sums of accrued hours over all of the employee’s appointments are written out for processing as a single transaction.

Assumptions:
If an employee moves between bargaining units having different 12 month participation periods their furlough hours should not expire before the end of the period in which they were accrued.

If an employee has concurrent appointments in bargaining units having different 12 month participation periods their furlough hours should not expire until the end of the period with the latest ending date.

Proposed Process:
A program that can be run to zero out forfeited furlough hours balances should be developed. It should report the forfeited hours and then zero the balance if three conditions are met

1. The current balance is not zero.
2. The employee is not actively accruing furlough hours
3. All of the 12 month salary reduction periods in which the employee accrued hours have ended.
1.0 One-time Processes ................................................................................................. 6
1.1 Employee Selection ................................................................................................ 6
  1.1.1 Furlough Hours Balance is not zero ................................................................. 6
  1.1.2 Employee is not actively accruing furlough hours .......................................... 6
  1.1.3 All of the employee’s participation periods have ended ................................. 6
1.2 Tab Delimited Report File .................................................................................... 7
System Requirements:

1.0 One-time Processes

The program should identify employees having forfeited furlough hours balances, report the furlough hours, and then set them to zero.

1.1 Employee Selection

1.1.1 Furlough Hours Balance is not zero.

The program should exclude employees having an hour balance equal to zero so as to avoid unnecessary reporting. It should select employees with either positive or negative amounts in Paid Time Off Hours Balance – Current (EDB 5187).

1.1.2 Employee is not actively accruing furlough hours.

The program should exclude employees having any unexpired (pay end date is equal or greater than SCR PROCESS DATE) distributions with SRB DOS Codes.

1.1.3 All of the employee’s participation periods have ended.

For employees not excluded by 1.1.1 and 1.1.2 above, the program should read the PAR in order to determine each of the combinations of Title Unit Code and Appointment Representation Code under which the employee accrued furlough hours. The existence of an earnings distribution having an SRB DOS Code should be assumed to have resulted in furlough hours accrual.

The PAR data should cover the pay periods ending September 2009 through the pay periods ending January 2011.

The program should apply logic similar to the furlough accrual program from Release 1877 when necessary. For example, if the TUC is blank, it should be derived from the TCT with the title code. If the AREP code is blank, assume C/Covered.

After determining all combinations of TUC and AREP under which the employee accrued hours, the program should obtain each of the corresponding furlough participation end dates from the accrual Factor File. As the Factor File contains two slightly different end dates (one for BW and one for MO payrolls) the participation end date should be considered the latter of the two pay period end dates.

The employee should be excluded if at least one of their TUC’s end dates has not yet been surpassed (when compared to SCR PROCESS DATE).
1.2 Tab Delimited Report File

Prior to zeroing Paid Time Off Hours Balance – Current (EDB 5187), the program should write the following to a tab-delimited file:

<table>
<thead>
<tr>
<th>Column Heading</th>
<th>Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Number</td>
<td>Employee Identification Number</td>
</tr>
<tr>
<td>Name</td>
<td>Employee Name (EDB0105)</td>
</tr>
<tr>
<td>Forfeited Balance</td>
<td>Paid Time Off Hours Balance – Current (EDB 5187)</td>
</tr>
<tr>
<td>Employee Unit Code</td>
<td>(EDB 0255)</td>
</tr>
<tr>
<td>Employee Representation Code</td>
<td>(EDB 0295)</td>
</tr>
<tr>
<td>Primary Title Code</td>
<td>(EDB 0460)</td>
</tr>
<tr>
<td>Home Department Code</td>
<td>(EDB 0114)</td>
</tr>
</tbody>
</table>