SR82961 Requirements
Web EDB Changes Application

Objective:
The objective of the project is to develop and release a web application and set of corresponding web services which will support edit and update functions on employee records stored on the Payroll/Personnel System's Employee Data Base (EDB).

Project Type:
This is a new PPS web application and web service development project.

Requested by:
UCOP Payroll Coordination and campus Controllers

Analyst:
Business analyst: Pixie Ogren, representing the campus Requirements Workgroup
Requirements analyst: UCOP business analyst, TBD

Urgency:
The development and installation of the application is Urgent.

Implementation Deadline:
The target release date for the application code is September 2010. It is recommended that campuses install the code as soon as possible after release in order to provide immediate value to departmental PPS users.
Statement of Business Need:

The UC’s Payroll/Personnel System (PPS) is a legacy mainframe payroll system, and system-wide leadership is exploring options to replace or modernize it. Campus controllers have resolved to move the University toward a common set of business practices and it is believed that modernizing or replacing PPS is an integral part of moving towards common payroll practices.

Replacing or modifying the University’s payroll system is a high risk project, and developing a strategy to do so is a multi-year, multi-million dollar effort. While more analysis is done in this area, the existing interface must be addressed now. In the winter of 2009, a usability survey was conducted to gather the opinions of PPS operators regarding the current interface. Results showed that the interface is unpopular, difficult to use, requires extensive training for new operators, and may lead users to enter bad data into the system.

Based on this analysis, the University resolved to invest in a new web interface to the existing system to make data entry more intuitive for PPS operators, and to explore the adoption of common interfaces between campuses. The first application developed to meet this need was a proof-of-concept web application to process “new hire” actions. This proof of concept application is currently was released in the late spring of 2010. The application described in this Service Request represents “phase II” of the overall effort and is focused on general EDB edit/update functionality.

Current Process:

Currently campus payroll administrators use individual CICS screens and bundles (collections of screens) to edit and update data on existing employee records. Rehire actions are typically processed via a "rehire" bundle which includes all of the individual screens requiring data update. Other business processes, such as promotions, reclasifications, etc. may be processed via individual CICS screens or via bundles defined at the local level.

It is noted that some campuses and medical centers have implemented HRIS systems to edit and update employee records.

Proposed Process:

The Web EDB Changes application will provide mechanisms to support the following EDB record change processes:

- Rehire process
- Changes to appointment and distribution data such as:
  - Promotions and reclasifications
  - Changes to fund source, percent of time, Title Code, Department, etc.
- Changes to employee information such as:
  - Assigned BELI and BELI Effective Date
  - Personal data: employee and campus address information
Personnel data: salary review information
Tax data: Citizenship Status, tax exemptions

The proposed application design is based primarily on the screens and data elements available in the PPS Web "New Hire" application. The EDB Changes application will present the same screens and same data elements as the New Hire application, with minor exceptions. These exceptions are noted in the detailed system requirements which follow.

Generally speaking the application will allow the user to edit and update any and all data elements presented on the seven data screens. The user will be responsible for understanding which data elements must be updated for any given business process (reclassification, changes to citizenship status, etc.)

The following change processes and related data are considered out of scope for the current project and will be targeted for subsequent development efforts shortly after the completion of phase 2:

- Separation actions and related data changes
- Leave of absence actions and related data changes
- Intercampus transfers

Some change/update processes such as those listed below may not be included at all. A determination concerning these mainly central office functions will be made at a later date.

- Benefits enrollment updates
- Deduction processing
- EDB record modifications restricted to central office processing

**Processing Considerations:**

PPS web applications are built to utilize standard RACF authentication on the "Main Menu" login module. This should continue to be the standard method of authentication for PPS web development projects. However it should be noted that several campuses have local single sign-on methods and many system-wide applications are being built to support Shibboleth single sign-on authentication.

Authentication (validating the user ID and password at login time) was put into place for the java rewrite of EDB inquiry. Since new hire, rehire and changes use the same login page, no changes are required.

The Rehire and Changes applications will enforce application-level authorization, so the application will check that the user is authorized before allowing him/her into it. Theoretically, a user could be authorized for Changes, but not Hire or Rehire, at the campus' discretion.
1.0 Overview of Modifications .................................................................................................. 5
2.0 CICS Modifications ............................................................................................................. 5
  2.1 Web Services ........................................................................................................ 5
    2.1.1 Modifications to IDOC web service (existing) ............................................. 5
    2.1.2 Employee Match Service (existing) .............................................................. 6
    2.1.3 Deletion Service (new) ................................................................................. 6
    2.1.4 Code Translation Service (existing) .............................................................. 6
    2.1.5 Cancellation Service ..................................................................................... 7
    2.1.6 Other Action Code or Rehire Related Services ............................................ 7
3.0 Web Modifications .............................................................................................................. 7
  3.1 Main Menu ........................................................................................................... 7
    3.1.1 Application Level Help ................................................................................. 8
  3.2 Application Level Functionality ........................................................................... 8
    3.2.1 Session Management .................................................................................... 8
    3.2.2 Navigation ..................................................................................................... 8
    3.2.3 Campus Parameters ..................................................................................... 10
    3.2.4 Suspense ...................................................................................................... 10
    3.2.5 Templates .................................................................................................... 10
    3.2.6 Rehire Process ............................................................................................. 12
  3.3 Employee Selection ............................................................................................ 13
  3.4 Employee Identification ..................................................................................... 14
  3.5 Personal Information ......................................................................................... 14
  3.6 Addresses and Disclosures ............................................................................... 16
  3.7 Citizenship and Taxes ......................................................................................... 19
  3.8 Employment Information ................................................................................... 21
  3.9 Appointments and Distributions ........................................................................ 23
  3.10 Education ........................................................................................................ 27
  3.11 Pay Disposition .................................................................................................. 29
  3.12 Summary Page .................................................................................................... 30
  3.13 Review Messages and Update .......................................................................... 30
  3.14 Post Authorization Notification (PAN) ............................................................ 30
  3.15 Confirmation ....................................................................................................... 30
4.0 Web EDB Inquiry, Web PAN, Web New Hire changes ................................................... 31
  4.1 Templates ............................................................................................................. 31
5.0 EDB Maintenance ............................................................................................................. 31
  5.1 Range and Value Edits .......................................................................................... 31
  5.2 Consistency Edits .................................................................................................. 31
  5.3 Derivations .......................................................................................................... 31
Attachment A - Revision History .................................................................................................. 32
Appendix B – Sources of codes and translations for Dropdown, Radio Button, and Auto-complete fields .................................................. 35
System Requirements:

1.0 Overview of Modifications

The project will focus on the development of a new web application using CICS web services to interface to Payroll/Personnel System’s Employee Data Base (EDB). It is envisioned that the new web application will leverage pre-existing CICS web services developed for the Web EDB Inquiry re-write (R1862, May 26, 2009) and the PPS Web New Hire application. Some modifications to the existing web services as well as a number of new web services will be required. The development of this application will not require any modifications to core business logic in the PPS beyond the scope of the web service logic.

- Control Table Updates: no Control Table Updates are required to support the new application
- EDB Data Elements: no changes to existing EDB data elements will be required, and no new data elements will be defined as part of the implementation.
- CICS Modifications: New and modified web services will be required to support new web application functionality
- Web Modifications: the project will focus on development of new web screens and supporting web components
- EDB Maintenance: no modifications to EDB maintenance processes will be required. The web application and web services will utilize existing range/value edits, consistency edits, and derivation processes.

2.0 CICS Modifications

2.1 Web Services

2.1.1 Modifications to IDOC web service (existing)

The IDOC web service should be modified to support a request for any IDOC document currently available within the base PPS system. The system currently provides for selection of the following IDOCs:

New Hire or Re-Hire documents:
- Staff
- Academic
- Student

Change-in-status documents:
- Staff
- Academic
- Student

Leave/Sabbatical documents:
• Staff-leave
• Academic – Leave/Sabbatical

Separation documents:
• Staff
• Academic
• Student
• Layoff

Personnel summary documents:
• All – landscape
• All – portrait

Benefits summary documents:
• Benefits enrollment
• Retirement and Savings

The IDOC requirements are based on the assumption that the IDOC menu selection and IDOC options are consistent across locations, and that the Web EDB Changes application does not need to support local customizations or options related to IDOC functionality.

2.1.2 Employee Match Service (existing)

The employee match service used by the EDB Changes application must return an employee record in the event that it finds an exact unique match for the Employee Name, Employee ID or Social Security Number.

If more than one record is found for the Name, the service should return the closest match from the employee database and allow the users to more forward or backward through the EDB to select the correct employee.

If more than one record is found for the Social Security Number, the application should issue a message.

2.1.3 Deletion Service (new)

The PPS application and distribution service should support the deletion of existing appointments and distributions on the employee record.

2.1.4 Code Translation Service (existing)

The Code Translation Service should retrieve and pass the valid values and, if present, code translations for the following personnel action code data elements:

• Personnel Action Code - Appointment (EDB 2033)
• Personnel Action Code - Distribution (EDB 2047)

Only user enterable action codes should be retrieved by the service for both appointment and
distribution action codes. See detail design for action code selection logic.

Note that all action codes and values at the employee, appointment, and distribution levels are
located under EDB 0001 in the DET and CTT tables.

2.1.5 Cancellation Service

Within the Web EDB New Hire application, a cancellation of the pending new hire action results
in the service clearing out the assigned Employee ID in the IID sub-system. It is noted that for the
Web EDB Changes application, the cancellation of an edit or update transaction should not result
in change to the Employee ID assignment in the IID sub-system.

2.1.6 Other Action Code or Rehire Related Services

This section is a placeholder for additional modifications to web services to support Rehire
functionality and/or Action Code functionality.

3.0 Web Modifications

Screens will be based on the general screen design and functionality built into the Web New Hire
application (SR 82349). The major differences shall be the requirements to:

• select an employee record
• display existing data for that employee record and make available for update
• enter action code data for defined appointment and distribution actions. There is no
  requirement to support employee-level action code entry at this time.
• minor navigation changes to support EDB record changes
• New field level Help
• support for additional IDOC menu selection
• support for actions that do not require Post Authorization Notification (PAN)
• support for "re-hire" actions

3.1 Main Menu

No changes are required to the login process currently in place on the Main Menu/PPS Web
application.

On the Main Menu presented after successful login, five new hyperlinks should be added:

• Active (clickable) link, labeled “Change Existing Employee Record”. Clicking on this
  link should take the user to the Employee Selection Screen.
• Active (clickable) link, labeled "Rehire". Clicking on this link should take the user to the
  same Employee Selection Screen. However the application should recognize that the
  transaction is associated with a "rehire" and transmit the appropriate Employee level
  Personnel Action Code upon completion of the transaction (see section 3.2.6 below).
3.1 Application Level Help

A hyperlink labeled “?” should be added immediately to the right of the EDB Update heading on the main menu. This link should take the user to the application-level help for the EDB Update functions.

3.2 Application Level Functionality

3.2.1 Session Management

The Web EDB Changes application will use the same session management mechanism as the PPS Web New Hire application, which references a campus-customizable, application level parameter to set the session timeout threshold.

The following changes will be required:

- At the point of session expiration, the application should discard any in progress transaction data. The application should not suspend partially completed transactions.
- Ninety seconds before session expiration, the application should issue the user a warning message with the following text: "Your session will timeout due to inactivity shortly." The user should also be presented with a button allowing them to remain logged in. If they click this button, the session clock should be reset.

3.2.2 Navigation

The primary heading row in the application should read "EDB Update System" and provide navigation links to return to the Main Menu and to Logout.

The secondary heading row in the application should read "Employee Changes" and once an employee has been selected should provide a navigation link to cancel the transaction. When this link is clicked, all entered data should be cleared out, and the user should return to the Employee Selection Screen. The employee selection should be cleared out (no employee selected). Note: the “select employee” link should not be available on the Employee Selection page.

The application should not provide any links to either suspend a transaction or to retrieve previously suspended transactions, as this functionality will not be supported in the EDB Changes application.

The navigation options displayed in the side navigation bar will depend upon the state of the transaction being processed.

- Employee Selection. When the user first enters the application, they will be taken to the Employee Selection screen and will see the following options:
  - Inactive links to all sub-panels
- The sub-panel buttons should be numbered and divided into two sections as follows:
  - **Section 1 - "Entry Screens"**
    - "1 Employee Identification"
    - "2 Personal Information"
    - "3 Address & Disclosures"
    - "4 Citizenship & Taxes"
    - "5 Employment Information"
    - "6 Appointments & Distributions"
    - "7 Education"
    - "8 Pay Disposition"
  - **Section 2 – "Review and Submit"**
    - "9 Summary"
    - "10 Review Messages and Update"
    - "11 Post Authorization Notification (PAN)"
    - "12 Confirmation"
    - All of the above except 9, 10, 11, and 12 should only become active after the user begins typing in any of the fields on the Employee Selection Screen.

- **Employee Selected**, after a user has selected an employee record and begun their transaction (visited a panel other than the selection panel)
  - Access to all sub-panels with the exception of 11, and 12

- **Ready for PAN**, after the user has resolved employee reject errors, or Ready for Update:
  - Access to all sub-panels with the exception of Confirmation
  - Confirmation link is visible but not active

- **Confirmation**, after successful transaction:
  - All previous sub-panels are visible but not active
  - Link to Confirmation is not clickable but is displayed as the active panel

In any state in which a change is in progress, the application should display a button or link to cancel the transaction at the top of the web page. No cancellation facility should be provided prior to employee selection or on the Confirmation page, after successful completion of the transaction.

The following navigation buttons are required on the bottom right of the designated panels:
• Next/Previous (linear navigation) buttons should be provided on each of the eight entry screens, with the following exceptions.
  o No previous button should appear on the first entry panel
  o On the last entry panel, “summary” should appear in place of “next”
• Each entry screen panel should have an update button labeled “Submit” which will direct the user to the Review messages panel. Note: if no consistency messages are returned at this time, the review panel will be bypassed and the user will be directed to the PAN panel.
• On Review Messages and Update Clicking the "Submit" button leads the user to the PAN panel, if a PAN is required for the transaction. If no PAN is required, the user will skip the PAN page and proceed straight to the Confirmation Page. The full set of EDB transactional data will be sent to PPS to update the Employee Database.
• On the PAN panel: Clicking the “Submit” button submits the full set of EDB transactional data to PPS in order to update the Employee Database.
• On the Confirmation panel: display a button labeled "Finished". Clicking on this button leads the user back to the Employee Selection screen. The currently selected employee will remain selected. The user should then be able to do another transaction with the same employee or select a new employee.

3.2.3 Campus Parameters
The PPS Web New Hire application defined the following campus-specific parameters that will be supported in the Web EDB Changes application:

• FAU layout
• Valid Citizenship Codes available for new hire
• Citizenship Fields entered during new hire
• Pay Disposition fields entered during new hire
• Ability of the preparer to enter registered units
• Ability of the preparer to enter PAN recipients via email

No additional campus-specific programming will be provided in this release.

3.2.4 Suspense
The suspense function that is provided in the PPS Web New Hire application will not be a feature of the Web EDB Changes application.

3.2.5 Templates
The Web EDB Changes application should provide the same template functionality that is provided in the PPS Web New Hire application.

The template feature will allow the user to enter data in a group of fields on a screen and then save those values in a named template, which can later be recalled and used while entering a
different record. This feature will save the user time during data entry and potentially reduce data entry errors.

When a template is recalled or “used,” all fields in that template whether blank or “populated” with data will overlay the screen fields.

The user should be able to bring up a screen listing all previously saved templates in alphabetical order, and from that screen be able to use or delete an existing template.

The template link should be disabled on both the Appointments and Distributions panels until an action code is first selected.

Users will need the ability to share templates between the Web New Hire application and the Web EDB Changes application. However, there is no requirement at this time to share templates among users.

Specifically the following data sections should support the creation and recall of templates with saved data:

- Campus address template, which contains the following fields:
  - Campus Address Line One (EDB 0331)
  - Campus Address Line Two (EDB 0332)
  - Campus Address City (EDB 0333)
  - Campus Address State (EDB 0334)
  - Campus Address Zip (EDB 0335)
  - Campus Address Building (EDB 0309)
  - Campus Address Room (EDB 0308)
  - Campus Phone #1 (EDB 0310)
  - Campus Phone #2 (EDB 0311)

- Appointment template, which contains the following fields:
  - Appointment Type (EDB 2020)
  - Basis (EDB 2010)
  - Paidover (EDB 2011)
  - Title (EDB 2006)
  - Duration (EDB 2004)
  - Begin Date (EDB 2002)
  - End Date (EDB 2003)
  - Grade (EDB 2008)
  - % Full Time (EDB 2012)
  - Fixed Variable (EDB 2013)
- Rate Code (EDB 2015)
- Ann/Hr Rate (EDB 2014)
- Schedule (EDB 2016)
- Time (EDB 2017)
- Leave (EDB 2018)

- The appointment template functionality should be available from within the Add Appointment and Modify Appointment screens. Note that the appointment template will not include Personnel Action Code as one of the saved data elements. The link to call up the list of templates will be inactive until the user first selects an action code for the appointment.

- Distribution template, which contains the following fields:
  - FAU (EDB 2043)
  - FTE (EDB 2051)
  - Distribution % (EDB 2052)
  - Pay Begin Date (EDB 2053)
  - Pay End Date (EDB 2054)
  - Step (EDB 2049)
  - Rate Amount (EDB 2055)
  - DOS (EDB 2056)
  - Perquisite (EDB 2057)
  - Work Study Program (EDB 2062)
  - Off/Above Scale (EDB 2050)

- The distribution template functionality should be available from within the Add Distribution and Modify Distribution screens. Note that the distribution template will not include Personnel Action Code as one of the saved data elements. The link to call up the list of templates will be inactive until the user first selects an action code for the distribution.

3.2.6 Rehire Process

The rehire process will work exactly like new hire except that the user will see the Employee Selection screen rather than the Employee Identification screen first.

An additional edit will be put on the Employee Selection screen to check for separation date. If there is no separation date associated with that employee, the following message will be displayed: "This employee record does not contain a separation date. You must resolve this issue before proceeding with a rehire."

The IDOC that would be available following the submit action should be the “Summary of Initial Hire or Rehire” IDOC.
### 3.3 Employee Selection

The Employee Selection page should provide three means by which a user can search for and select an employee record for edit and update:

- Search by: Employee ID (text entry)
- Search by: SSN (text entry)
- Search by: Name (text entry and display table)

If the user enters more than one employee identifier, an error message should be displayed.

The Employee Selection page should have a "Select" button. Both the select button and the left side navigation options should be grayed out (not active) until the user begins typing in one of the employee identifier fields.

Once a user has entered search criteria, they can either click the "employee select" button in the lower right portion of the page or click a navigation tab to go directly to the entry panel for that employee.

When a user enters an Employee ID or SSN, the application service should look for an exact match on the EDB. At this point, several scenarios are possible. There may be an exact match, no match, or multiple matches (name and SSN only). Assuming that an exact match is found:

- If the user clicked one of the left side navigation tabs, the user should go directly to that selected screen. The secondary heading should show the identifying information for that employee.
- If the user clicked the select button, he/she should stay on the Employee Selection page and the employee’s name, employee ID, birthdate, home department, employment status and primary pay schedule should be displayed. In addition, the secondary heading should show the identifying information for that employee.

The following processing should occur in cases where there is no exact match or there are multiple matching records:

- **Name:**
  - If there was more than one match or no exact match for the name, the system should return a 30 line table displaying name, ID number, and home department, beginning with the closest match to the entered name, followed in alphabetical order by the subsequent records.
  - The table should provide navigation links to allow the user to move forward or backward thirty records at a time.
  - The employee name displayed in the table should be a clickable link, allowing the user to select the desired employee record from those returned.
  - Selecting a record should return the user to the Employee Selection screen, where the selected employee’s data should appear.

- **Employee ID:**
  - If no exact match was found, a "No match found" error message should be displayed.
Social Security Number:
  - If no exact match was found, a "No match found" error message should be displayed.
  - If more than one matching record is found for the SSN, the application should issue the following message: "There are multiple employees with that SSN. Enter name or employee ID instead."

### 3.4 Employee Identification

The Employee Identification web screen should display the following screen level help:

"Need new panel text for this section defined by users"

The employee identification screen should allow for entry and update of the following data elements. The data elements should display any existing values for the selected employee record. Note that this set of data elements is consistent with the set of data elements displayed on the "New Hire – Employee Identification" screen.

Data Elements:
- First Name (EDB 0250)
- Middle Name (EDB 0251)
- Last Name (EDB 0252)
- Suffix (EDB 0106)
- Date of Birth (EDB 0107)
  - must be a valid date
  - mask
- SSN (EDB 0111)
  - mask

Users should be able to modify name, SSN, and birthdate and the system should not re-assign the Employee ID number in this situation. If the user enters Social Security Number and birthdate combination that already exists in the EDB, then an error message should be displayed and the user should not be allowed to proceed with the change.

### 3.5 Personal Information

The Personal Information web screen should display the following screen level help:

"Information in this section is intended to identify the employee's ethnicity, gender, and veteran status. The purpose of the requested information is to meet the University's legal obligations as a federal contractor."

Note that this screen level help text is consistent with text displayed on the New Hire application.

The Personal Information screen should allow for entry and update of the following data elements. The data elements should display any existing values for the selected employee record.
Data Elements:

- **Sex (EDB 0108)**
  - radio button
  - See “Source of Radio Button Values” in Appendix B for the source of available values for this field.

- **Ethnicity (EDB 0112)**
  - dropdown
  - see “Source of Dropdown Values” in Appendix B for the source of available values for this field.

- **Disabled Status (EDB 0352)**
  - radio button
  - see “Source of Radio Button Values” in Appendix B for the source of available values for this field.

- **Is the Employee a US Veteran**
  - The text of the message will be "Employee is a US Veteran"
  - radio button
  - pivot field
  - If any one of the five fields below contains something other than initial values, then “Yes” should be assigned to this field. Otherwise, it should default to “No.”
  - If a “Yes” value is initially assigned and the user clicks the “No” button, then a message should inform the user that there is data in one of the related fields below.
  - If the user changes this value from “No” to “Yes” then this question should disappear and the five fields below should continue to be displayed as long as this employee’s record is being updated.

- **War/Campaign/Expedition (EDB 0345)**
  - radio button
  - see “Source of Radio Button Values” in Appendix B for the source of available values for this field.
  - only displayed if user selects “Yes” for “Is the Employee a US Veteran” or if one of these five fields (EDB 0345, EDB 0350, EDB 0344, EDB 0381, EDB 0351) contains non-initial values.

- **Vietnam Veteran (EDB 0350)**
  - radio button
  - see “Source of Radio Button Values” in Appendix B for the source of available values for this field.
The mechanism to edit and update ethnicity data should reflect PPS requirements to modify ethnicity data collection, published in PPS Service Request 82583, Race and Ethnicity Data Restructuring in Payroll. The Web EDB Changes application must incorporate the following new data elements defined in that Service Request:

- Hispanic Indicator (Y/N): "Hispanic, Latino, or Other Spanish origin"

Next, the user should be able to select one or more of the following choices:

- African American (Y/N)
- Asian (Y/N)
- White Indicator (Y/N)
- American Indian or Alaska Native (Y/N)
- Native Hawaiian or other Pacific Islander (Y/N)

The label for the current Ethnic Origin Code (EDB 0112) should be modified to read "Primary Ethnicity".

### 3.6 Addresses and Disclosures
The Addresses and Disclosures web screen should display the following screen level help:

"Please enter the employee's contact information including permanent address, campus address, telephone number and disclosure preferences."

Note that this screen level help text is consistent with text displayed on the New Hire application.

The Addresses and Disclosures screen should allow for entry and update of the following data elements. The data elements should display any existing values for the selected employee record. Note that this set of data elements is consistent with the set of data elements displayed on the "New Hire – Addresses and Disclosures" screen.

Data Elements:

- Foreign Address Indicator (EDB 0291)
  - radio button
  - pivot field
  - set with current EDB value
  - see “Source of Radio Button Values” in Appendix B for the source of available values for this field.

- Street Address/Address Line One (EDB 0204)

- Address Line Two (EDB 0205)

- City (EDB 0206)

- State (EDB 0207)
  - dropdown
  - only displayed if Foreign Address Indicator is “US Address”
  - value should be cleared if the user changes Foreign Address indicator to “Foreign Address”
  - see “Source of Dropdown Values” in Appendix B for the source of available values for this field.

- Zip (EDB 0208)
  - only displayed if Foreign Address Indicator is “US Address”
  - value should be cleared if the user changes Foreign Address indicator to “Foreign Address”

- Province (EDB 1120)
  - only displayed if Foreign Address Indicator is “Foreign Address”
  - value should be cleared if the user changes Foreign Address indicator to “US Address”

- Postal Code (EDB 1119)
- Country (EDB 1118)
  - only displayed if Foreign Address Indicator is “Foreign Address”
  - autofill
  - see “Source of Auto-complete Values” in Appendix B for the source of available values for this field.
  - value should be cleared if the user changes Foreign Address indicator to “US Address”

- Address Release Campus (EDB 0244)
  - radio button
  - see “Source of Radio Button Values” in Appendix B for the source of available values for this field.

- Address Release Emp Org (EDB 0247)
  - radio button
  - see “Source of Radio Button Values” in Appendix B for the source of available values for this field.

- Phone (EDB 0210)
  - mask

- Phone Release Campus (EDB 0245)
  - radio button
  - see “Source of Radio Button Values” in Appendix B for the source of available values for this field.

- Phone Release Emp Org (EDB 0248)
  - radio button
  - see “Source of Radio Button Values” in Appendix B for the source of available values for this field.

- Spouse Name (EDB 0312)

- Spouse Name Release Campus (EDB 0246)
  - radio button
  - see “Source of Radio Button Values” in Appendix B for the source of available values for this field.

- Campus Address Line One (EDB 0331)
• Campus Address Line Two (EDB 0332)
• Campus Address City (EDB 0333)
• Campus Address State (EDB 0334)
  o Dropdown
  o see “Source of Dropdown Values” in Appendix B for the source of available values for this field.
• Campus Address Zip (EDB 0335)
• Campus Address Building (EDB 0309)
• Campus Address Room (EDB 0308)
• Campus Phone #1 (EDB 0310)
  o mask
• Campus Phone #2 (EDB 0311)
  o mask

3.7 Citizenship and Taxes

The Citizenship and Taxes web screen should display the following screen level help:

"Citizenship status and tax withholding are two separate issues, but for all employees who are not U.S. citizens (aliens), the citizenship code may control the tax exemptions and filing status an employee may elect. Employees who are U.S. citizens simply fill out a W-4 form indicating their filing status and exemptions. For employees who are not US citizens, the W-4 is still the basis for completing the Citizenship and Taxes Page. However, aliens are required to follow IRS regulations for Alien employees. The filing status and exemptions are determined by these regulations."

Note that this screen level help text is consistent with text displayed on the New Hire application.

The Citizenship and Taxes screen should allow for entry and update of the following data elements. The data elements should display any existing values for the selected employee record. Note that this set of data elements is consistent with the set of data elements displayed on the "New Hire – Citizenship and Taxes" screen.

Data Elements:

• Is this Employee a US Citizen?
  o radio button
  o pivot field
  o If existing Citizenship Code is not “C” then this field should be assigned a value of “No.” Otherwise it should be assigned a value of “Yes”
  o see “Source of Radio Button Values” in Appendix B for the source of available values for this field.

• Citizenship Code (EDB 0109)
- Country of Residence (EDB 0143)
  - autofill
  - only displayed if Citizenship Code is not “C”
  - see “Source of Auto-complete Values” in Appendix B for the source of available values for this field.

- Visa Type (EDB 0110)
  - dropdown
  - only displayed if Citizenship Code is not “C”
  - see “Source of Dropdown Values” in Appendix B for the source of available values for this field.

- Visa Work Permit End Date (EDB 0184)
  - mask
  - date picker
  - must be a valid date
  - only displayed if “Is this Employee a US Citizen” is No

- Tax Treaty Income Code (EDB 1170)
  - dropdown
  - only displayed if “Is this Employee a US Citizen” is No
  - see “Source of Dropdown Values” in Appendix B for the source of available values for this field.

- US Date of Entry (EDB 1169)
  - mask
  - date picker
  - must be a valid date
  - only displayed if “Is this Employee a US Citizen” is No

- UC W-8BEN Signature Date (EDB 1168)
  - mask
  - date picker
• Federal Marital Status (EDB 0127)
  o radio button
  o see “Source of Radio Button Values” in Appendix B for the source of available values for this field.

• Federal Personal Allowances (EDB 0128)
  o mask

• Federal Additional Withholdings (EDB 6010)
  o mask

• State Marital Status (EDB 0130)
  o radio button
  o see “Source of Radio Button Values” in Appendix B for the source of available values for this field.

• State Personal Allowances (EDB 0131)
  o mask

• State Itemized Deductions (EDB 0132)
  o mask

• State Additional Withholdings (EDB 6011)
  o mask

### 3.8 Employment Information

The Employment Information screen should allow for entry and update of the following data elements. The data elements should display any existing values for the selected employee record. Data Elements:

• Most Recent Date of Hire (EDB 0113)
  o mask
  o date picker
  o must be a valid date

• Oath Signature Date (EDB 0705)
  o mask
  o date picker
  o must be a valid date
- I-9 Signature Date (EDB 0284)
  - mask
  - date picker
  - must be a valid date
- BELI Assigned (EDB 0360)
  - Dropdown
    - see “Source of Dropdown Values” in Appendix B for the source of available values for this field.
- BELI Effective Date (EDB 0341)
  - mask
  - date picker
  - must be a valid date
- Employee Relations Code (EDB 0160)
  - Dropdown
    - see “Source of Dropdown Values” in Appendix B for the source of available values for this field.
- Academic Programmatic Unit Code (EDB 0660)
- Student Status (EDB 0119)
  - Dropdown
    - see “Source of Dropdown Values” in Appendix B for the source of available values for this field.
- Number of Units (EDB 0237)
- Probationary Period End Date (EDB 0706)
  - mask
  - date picker
  - must be a valid date
- Next Salary Review Date (EDB 0136)
  - mask
- Next Salary Review Type (EDB 0135)
  - Dropdown
    - see “Source of Dropdown Values” in Appendix B for the source of available values for this field.
3.9 Appointments and Distributions

The Appointments and Distribution screen should display the following screen level help:

“The table below lists each of the appointments added to this employee. Use the buttons below or the action buttons to add, edit, or delete appointments/distributions.”

The Edit Appointment function should display the following help text:

“Appointments are established to define the terms and conditions of employment with the University. For example, the appointment records the beginning and ending dates of the appointment, the department the appointment is in, the personnel program and job title, and whether the appointment is career, limited, contract, casual/restricted, academic or a Unex Instructor.”

The Edit Distribution function should display the following help text:

“Distributions are established to define how the employee is paid. For example, distributions record information about the pay rate the employee will receive, the account number the pay will be charged to, and what type of pay it is, e.g. regular pay, shift differential, or a stipend.”

Note that this screen level help text is consistent with text displayed on the New Hire application.

The Appointments and Distributions screen should allow for entry and update of the following data elements. The data elements should display any existing values for the selected employee record. Note that this set of data elements is consistent with the set of data elements displayed on the "New Hire – Appointments and Distributions" screen.

The appointment or distribution number for existing appointments/distributions will not be allowed to be modified. Users may delete existing appointments/distributions but they will not be able to add a new appointment/distribution with the same number as the now deleted appointment/distribution.

The same logic regarding rates and percentage time applied in the new hire module, will be applied in this module.

Appointment Level Data Elements:

- Intercampus Transfer (EDB 0010)
  - dropdown
  - see “Source of Dropdown Values” in Appendix B for the source of available values for this field.
- Original Date of hire (EDB 0704)
  - mask
- Home Department Code (EDB 0114)
- Alternate Department Code (EDB 0235)
- Special Training Required Code (EDB 0385)
• Appointment Number (EDB 2001)
  o A screen-level edit allows only values of 10, 20, 30, 40, 50, 60, 70, 80 and 90.
  o No duplicate appointment numbers are allowed.
• Appointment Type (EDB 2020)
  o dropdown
  o see “Source of Dropdown Values” in Appendix B for the source of available values for this field.
• Basis (EDB 2010)
  o dropdown
  o see “Source of Dropdown Values” in Appendix B for the source of available values for this field.
• Paidover (EDB 2011)
  o dropdown
  o see “Source of Dropdown Values” in Appendix B for the source of available values for this field.
• Title (EDB 2006)
  o autofill
  o see “Source of Auto-complete Values” in Appendix B for the source of available values for this field.
• Duration (EDB 2004)
  o dropdown
  o see “Source of Dropdown Values” in Appendix B for the source of available values for this field.
• Begin Date (EDB 2002)
  o date picker
  o mask
  o must be a valid date
• End Date (EDB 2003)
  o date picker
  o mask
  o must be a valid date
• Grade (EDB 2008)
• % Full Time (EDB 2012)
• Fixed Variable (EDB 2013)
  o dropdown
  o see “Source of Dropdown Values” in Appendix B for the source of available values for this field.

• Rate Code (EDB 2015)
  o dropdown
  o see “Source of Dropdown Values” in Appendix B for the source of available values for this field.

• Ann/Hr Rate (EDB 2014)
  o appointment rate code must be set in order for this field to be unlocked.
  o mask

• Schedule (EDB 2016)
  o dropdown
  o see “Source of Dropdown Values” in Appendix B for the source of available values for this field.

• Time (EDB 2017)
  o dropdown
  o see “Source of Dropdown Values” in Appendix B for the source of available values for this field.

• Leave (EDB 2018)
  o dropdown
  o see “Source of Dropdown Values” in Appendix B for the source of available values for this field.

• Appointment Department Code (EDB02009)

• Start Begin Date (EDB 0496)
  o date picker
  o mask
  o must be a valid date

• Start End Date (EDB 0497)
  o date picker
  o mask
  o must be a valid date
• Start Reduction Percentage (EDB 0495)
  o Text field
  o mask

Distribution Level Data Elements:

• Distribution Number (EDB 2041)
  o Only valid distribution numbers are allowed for each appointment (e.g., 11-18, 21-28, 31-38, etc.)
  o Duplicate distribution numbers are not allowed.

• FAU (EDB 2043)
  The configuration of this field is part of Campus Customization.

• FTE (EDB 2051)
  o mask

• Distribution % (EDB 2052)
  o mask

• Pay Begin Date (EDB 2053)
  o date picker
  o mask
  o must be a valid date

• Pay End Date (EDB 2054)
  o date picker
  o mask
  o must be a valid date

• Step (EDB 2049)

• Rate Amount (EDB 2055)
  o mask

• DOS (EDB 2056)
  o autofill
  o see “Source of Auto-complete Values” in Appendix B for the source of available values for this field.

• Perquisite (EDB 2057)
  o dropdown
Action codes will be required for appointment and distribution actions. The user must select at least one and up to three valid actions for each appointment or distribution being modified. Valid action codes for appointments and distributions should be available to the user in a drop down menu format; the application should prevent entry update on any data element fields until the user has selected an action code. Not all actions require an action code but, in order to enforce entry of an action code, a new choice of “no action code required” will be provided at the end of the list of action codes. Users can select this choice and the system will allow them to proceed. In this case, no action code will be passed to Update module.

### 3.10 Education

The Education web screen should display the following screen level help in the Licenses and Certificates section:

"State and Federal laws and University policy require that employees in certain professions and hired into certain positions have valid licenses or certificates. For example, employees in Dental Hygienist titles must have a dental hygienist license, and employees in positions that require driving must have a valid California Driver's License. This screen allows entry and update of specific licenses and certificates and their renewal dates. Multiple licenses and certificates and multiple renewal dates may be entered for a single employee."

Note that this screen level help text is consistent with text displayed on the New Hire application.

The Education screen should allow for entry and update of the following data elements. The data elements should display any existing values for the selected employee record. Note that this set of data elements is consistent with the set of data elements displayed on the "New Hire – Education" screen.

Licenses and Certificates should be allowed to be deleted. Users should be allowed to deleted them in the same way as they would in the new hire modules. The difference is that this module will have to pass a message to PPS to explicitly remove the record from the EDB.

**Data Elements:**

- **Education Level (EDB 0116)**
  - dropdown
  - see “Source of Dropdown Values” in Appendix B for the source of available values for this field.
• Year Education Completed (EDB 0117)
  o mask

• Highest Degree Institution Code (EDB 0701)
  o autofill
  o see “Source of Auto-complete Values” in Appendix B for the source of available values for this field.

• Highest Degree Specialty Code (EDB 0710)
  o autofill
  o see “Source of Auto-complete Values” in Appendix B for the source of available values for this field.

• Current Specialty Code 1 (EDB 0707)
  o autofill
  o see “Source of Auto-complete Values” in Appendix B for the source of available values for this field.

• Current Specialty Code 2 (EDB 0708)
  o autofill
  o see “Source of Auto-complete Values” in Appendix B for the source of available values for this field.

• Current Specialty Code 3 (EDB 0709)
  o autofill
  o see “Source of Auto-complete Values” in Appendix B for the source of available values for this field.

• Prior University Service Institution (EDB 0703)
  o autofill
  o see “Source of Auto-complete Values” in Appendix B for the source of available values for this field.

• Non-UC Prior Service Code (EDB 0118)
  o dropdown
  o see “Source of Dropdown Values” in Appendix B for the source of available values for this field.

• License/Certificate Code (EDB 0711)
  o autofill

• License/Certificate Number (EDB 0718)
• License/Certificate Renewal Date (EDB 0712)
3.11 Pay Disposition

The Pay Disposition screen should allow for entry and update of the following data elements. The data elements should display any existing values for the selected employee record. Note that this set of data elements is consistent with the set of data elements displayed on the "New Hire – Pay Disposition" screen.

Data Elements:

- Pay Disposition Code (EDB 0201)
  - dropdown
  - see “Source of Dropdown Values” in Appendix B for the source of available values for this field.

- Online Earnings Statement (EDB 1124)
  - radio button
  - see “Source of Dropdown Values” in Appendix B for the source of available values for this field.

- Check Address – Line One (EDB 0301)
- Check Address – Line Two (EDB 0302)
- Check Address – City (EDB 0303)
- Check Address – State (EDB 0304)
  - Dropdown
  - see “Source of Dropdown Values” in Appendix B for the source of available values for this field.

- Check Address – Zip (EDB 0305)
  - mask

- Direct Deposit Bank Table Key (EDB 0230)
  - autofill

- Checking/Savings Indicator (EDB 0226)
  - Dropdown
  - see “Source of Dropdown Values” in Appendix B for the source of available values for this field.

- Bank Account Number (EDB 0203)
3.12 Summary Page

The Summary web screen should display the following screen level help:

"You have entered the following data so far. You may use the 'Review Messages and Update' button below to validate this data with the PPS System."

The Summary page should display all data elements from all application sub-panels. For fields that have been modified by the user during the session, the application should display the data change, highlighted in orange accompanied with an icon of the word "new"

The application should also allow the user to view the employee original data at the time the transaction began. Each section on the summary page will contain a button labeled "Old Data" which should replace the contents of the section to what they were when the employee was first loaded.

3.13 Review Messages and Update

The application should transmit that data in the employee record that was modified during the session only. Unchanged data will not be sent to the PPS service. The service is expected to perform any applicable consistent edits and return messages back to the web application. Note that some consistency edits may issue messages for data elements that were not updated by the application user in the current change session. When the user clicks “Submit,” either the PAN or Confirmation screen should be displayed. The PAN screen will only be displayed if the updates require a PAN.

3.14 Post Authorization Notification (PAN)

Depending on the data changes initiated in the Web EDB Changes application, a Post Authorization Notification (PAN) may or may not be triggered for the transaction.

- If a PAN is triggered by the data update, the application should display the PAN text, data, comments section, and recipient selection features that are standard in the PAN function.

- If a PAN is not triggered by the data update, the user should go directly to the Confirmation Page.

At the bottom of the PAN panel, the application should provide a button to "Submit ". When the user presses this button, the data should be submitted to PPS and committed to the EDB and the Confirmation page should be displayed.

As in the PPS Web New Hire application, a link should be provided on the page to allow the user to view the HTML PAN.

3.15 Confirmation

The Confirmation web screen should display the following screen level help:

“You have just completed your transaction for [Employee Name]. Use the IDOC menu below if you would like to generate an IDOC for this transaction. You may also proceed with a new transaction by clicking the “Finished” button”
At this point, the transaction is completed and all entered data should be cleared out of the web session. All left side navigation options should be unavailable at this point. The “Cancel” button should not be available, but the “select another employee” button should be available.

From this screen, the user should be able to generate an IDOC from a selection of available IDOCs in PPS or return to the employee selection screen by clicking the “finish” button.

- It is assumed that all standard IDOCs available in CICS will also be available for selection on the web screen.
- When the user selects the specific IDOC, the service should return the format options available for that IDOC. In some cases the format options vary by type of employee (staff, academic, student) or by physical layout (landscape, portrait).
- If they return to the employee selection screen, their most recent employee selection should still be in effect.

It is noted that once the user exits the Confirmation screen, the user may not return to that section of the application without first initiating and completing another change transaction.

4.0 Web EDB Inquiry, Web PAN, Web New Hire changes

4.1 Templates

As discussed in section 3.2.5, templates will be modified so that the fields in the template, whether they contain data or are blank will overlay their corresponding fields on the screen. Additionally, visual feedback in the form of highlighting will be added to indicate which data came in from the template.

5.0 EDB Maintenance

5.1 Range and Value Edits

Existing range and value edits will be exercised on each individual screen of the application for each data element.

5.2 Consistency Edits

Consistency edits will be invoked for just those employee data elements that were modified during the session.

5.3 Derivations

Any derivations existing currently in PPS will continue to be exercised. The application will not introduce new derivations outside the parameters of base PPS.
## Attachment A - Revision History

<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1</td>
<td>4/12/2010  3:17 PM</td>
<td>Leo Herrick</td>
<td>Modified sections: 2.14, 3.2.1, 3.2.2, 3.3, 3.17</td>
</tr>
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<td>1.2</td>
<td>4/13/2010  9:50 AM</td>
<td>Beth Burkart</td>
<td>Worked on lists of data elements on screens.</td>
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<tr>
<td>1.3</td>
<td>4/13/2010  11:45 AM</td>
<td>Beth Burkart</td>
<td>Worked on lists of data elements on screens.</td>
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<tr>
<td>1.4</td>
<td>4/13/2010  2:35 PM</td>
<td>Beth Burkart</td>
<td>Worked on lists of data elements on screens.</td>
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<tr>
<td>1.5</td>
<td>4/13/2010  4:30 PM</td>
<td>Beth Burkart</td>
<td>Worked on templates section 3.2.5</td>
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<tr>
<td>1.6</td>
<td>4/14/2010  10:20 AM</td>
<td>Beth Burkart</td>
<td>Worked on templates section 3.2.5 and added to help on 3.10</td>
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<td>1.8</td>
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<td>Beth Burkart</td>
<td>Minor edits as discussed with Leo 4/15.</td>
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<td>1.9</td>
<td>4/15/2010  2:03 PM</td>
<td>Beth Burkart</td>
<td>Minor edits to 3.10 and 5.2</td>
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<td>1.9.1</td>
<td>4/20/2010  1:47 PM</td>
<td>Leo Herrick</td>
<td>Edited Navigation Bar Section 3.2.2</td>
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<tr>
<td>2.0</td>
<td>4/26/2010  1:36 PM</td>
<td>Leo Herrick</td>
<td>Updated the document with some comments from last Thursday's meeting with Pixie.</td>
</tr>
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<td>2.1</td>
<td>4/26/2010  4:55 PM</td>
<td>Beth Burkart</td>
<td>Updated the document with some comments from last Thursday's meeting with Pixie. Accepted some of the previous changes.</td>
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<td>2.2</td>
<td>4/27/2010  9:47 AM</td>
<td>Beth Burkart</td>
<td>Updated the document with some comments from last Thursday's meeting with Pixie. Accepted some of the previous changes.</td>
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<td>Description</td>
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<td>Beth Burkart</td>
<td>Updated the document with some comments from last Thursday's meeting with Pixie. Accepted some of the previous changes.</td>
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<td>2.4</td>
<td>4/27/2010 3:00 PM</td>
<td>Beth Burkart</td>
<td>Updated the document with some comments from last Thursday's meeting with Pixie. Accepted some of the previous changes. Updated the TOC</td>
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<tr>
<td>2.5</td>
<td>4/28/2010 9:21 AM</td>
<td>Beth Burkart</td>
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<td>2.6</td>
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<td>2.7</td>
<td>4/28/2010 5:18 PM</td>
<td>Beth Burkart</td>
<td>Updated based on meeting with Leo.</td>
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<tr>
<td>2.8</td>
<td>5/10/2010 10:07 AM</td>
<td>Leo Herrick</td>
<td>Reviewed and accepted pending changes, made modifications to web services section.</td>
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<td>3.0</td>
<td>7/12/2010 12:30 PM</td>
<td>Leo Herrick &amp; Stacey Johnson</td>
<td>Addressed Issues raised in Kathy's document.</td>
</tr>
<tr>
<td>3.1</td>
<td>7/20/2010 9:00 AM</td>
<td>Leo Herrick &amp; Stacey Johnson</td>
<td>Addressed Issues raised in Kathy's 7/14 email.</td>
</tr>
<tr>
<td>3.2</td>
<td>7/20/2010 11:00 AM</td>
<td>Leo Herrick</td>
<td>Addressed delete/add situation in section 3.9. Apts/Dists can not be added with the same number as deleted ones.</td>
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### Appendix B - Sources of codes and translations for Dropdown, Radio Button, and Auto-complete fields

#### Source of Dropdown Values

<table>
<thead>
<tr>
<th>Data element #</th>
<th>Label</th>
<th>Screen Name</th>
<th>Code</th>
<th>Translation</th>
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</thead>
<tbody>
<tr>
<td>0112</td>
<td>Ethnicity</td>
<td>2 - Personal Information</td>
<td>From DET from CTT</td>
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<td>0207</td>
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<td>3 - Address &amp; Disclosures</td>
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<td>State (Campus Address)</td>
<td>3 - Address &amp; Disclosures</td>
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<td>0109</td>
<td>What type of Non-Citizen is his Employee?</td>
<td>4 - Citizenship &amp; Taxes</td>
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<td>Student Status</td>
<td>5 - Employment Information</td>
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<td>From DET from CTT</td>
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<td>0344</td>
<td>Armed Service Medal</td>
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<td>From DET from CTT</td>
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<td>War/Campaign/Expedition</td>
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### Source of Auto-complete Values

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IC HR/BENEFITS - INFORMATION SYSTEMS SUPPORT
SERVICE REQUEST
URIC 160152 (R 01/00)

DATE
04/13/10

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PRODUCTION RUN

RETRIEVAL/PRODUCTION RUN

APPROVAL TO

UC Office of the President, Information Resources & Communications
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Page 37 of 37