

**Created on:** December 10, 2010  
**Last Modified on:** June 13, 2011, 2011  
**Service Request: SR83214**  
**Title:** Enhancements to the Web EDB System

**Objective:**

Modify the Web EDB System by installing several enhancements that were proposed by the campuses

**Project Type:**

PPS Web

**Requested by:**

Payroll Coordination and Tax Services

**Analyst:**

Business analyst: Marcia Johnson  
Requirements analyst: Beth Burkart

**Due Date:**

Urgent

**Implementation Deadline:**

It is recommended that enhancements outlined in this request be released to campuses along with the release of Phase III of the EDB web project.

**Statement of Business Need:**

UC Campuses requested several enhancements be made to the web application during the test phase of the Web New Hire Application. Due to a lack of resources, the requested enhancements were deferred to a later date. This request addresses the enhancements that were deferred.

**Background:**

Release 1923 created a new web interface to the EDB that allowed users to add newly hired employee data to the EDB. Release 1953 added the ability to update existing EDB records via the web interface and also added rehire functionality.

**Current Process:**

None

**Proposed Processes:**

Update the Web EDB System by adding the following enhancements:

1. Add E-Verify Status and Date Fields – This should appear on the Employment Information Tab. It should be placed below the I-9 Information with the E-verify Date field first followed by the Status Field. The Help Text in the web application should read the same as in the Base Payroll System (CICS).
2. Add “Duplicate PAN Reviewer” error message – An error message should be given to the preparer if a duplicate USERID is entered as a PAN reviewer. The message should be a pop-up and should read “Duplicate Entry. Entry already exists.” The same process and error message should also be used when a duplicate email address is entered on the PAN reviewer screen. If the email address is a duplicate, the user should be blocked from entering it and the pop-up error message should appear. The userid that was entered should stay in the box.
3. Display bank account format – Display the bank account format on the Pay Dispo Screen to eliminate invalid bank account format errors. This field should not be available for the user to enter information until the Bank table key and the Checking/Savings indicator are populated.



**See Example**

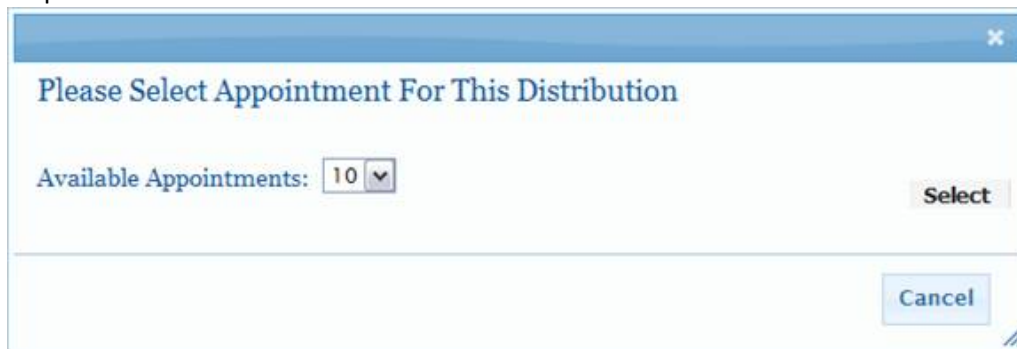
4. Update the Template Save Edit function. The application should display a warning message before a user overrides an existing template. The message should read, “**The template (template name)** already exists. To replace the template click save. Otherwise click cancel.” Cancel will take you back to the original pop-up so that the template can be renamed.
5. Enhance the suspend function. If the user has an appointment or distribution open and clicks “suspend & exit” the system should issue the following message: “Please save or cancel the update in progress.” The user must then save or cancel the appointment or distribution update before being able to suspend the transaction. This is consistent with how the system behaves when the user has an appointment or distribution open and clicks on a left navigation menu choice. Currently when a user has an appointment or distribution open and clicks the suspend & exit button, the unsaved appointment or distribution data is not retained.

6. Change the message that is displayed when recalling suspended transactions. The new message should say “Below is a list of your suspended transactions. Select one transaction from the list and click the “Use” button to resume. Note that a transaction that has been taken out of suspense will not appear on the list of suspended items unless you suspend it again.”
7. Currently, the system displays an error message to the user when the user attempts to copy a distribution from an appointment that contains the maximum number of distributions. When this occurs, the copy function is blocked and the system displays message, “You've reached the maximum number.”

Modify the distribution copy function as follows:

- If the user attempts to copy a distribution from an appointment that already contains eight distributions (i.e., the maximum number of distributions has been reached), they should be presented with the following message. "This appointment already contains the maximum number of distributions. Please indicate to which appointment this distribution should be copied by selecting from the list below."

The following illustration depicts the recommended look and feel of the message that would be presented to the user.



The following text should appear below the drop-down list of available appointments: “If you want to create a new appointment and copy the distribution to it then click cancel and use the Appointment Copy function to create the new appointment. Once the appointment is created it will be available in the “Available Appointment” section above.”

If the user chooses from the list of available appointments and then clicks the “select” button, then the system should add the copied distribution to the next available distribution under the selected appointment. Note that appointments that contain the maximum number of distributions should not be contained in the list of available appointments.

8. Add a link to IDOC on the main menu so a user does not need to first choose Rehire or Change to access them. The link should be placed under Intercampus Transfer on the Main Menu. The user should be presented with the same employee selection screen that they see if they choose “Change to employee record.” The assumption will be that a user won’t access the IDOC for a New Hire from the main menu since there would be no existing record to access. The security profiles for the IDOC application should mirror the current security profiles in CICS.

Currently in the Web EDB Update application, there is an IDOC section on the left navigation menu. The corresponding section heading "IDOC" along with the menu choice "Select and Print IDOC" should be removed from this left navigation menu throughout the Web EDB Update application. This menu choice is no longer needed, since IDOC is being added to the PPS Web main menu.

Currently, once the user submits a hire or change transaction to PPS, a "Select and Print IDOC" button appears at the bottom of the screen. This should remain the same.

Currently, once the user has selected an IDOC, various buttons appear at the bottom of the screen. In the "Changes" application, these buttons are currently "Select and Print IDOC," "Main Menu," "Select a new Employee," and "View Employee in EDB Inquiry." Currently in Web New Hire, these buttons are: "Begin New Hire" and "Main Menu." Modifications should be made so that the buttons in the Select and Print IDOC function are consistent regardless of whether the user came from New Hire, Changes, or the IDOC link on the main menu. The buttons should be as follows:

- EDB Inquiry
- EDB Change
- New Hire
- Main Menu

Add all remaining IDOCs and Actions to the current IDOC panel. IDOCs and Actions should be as follows:

#### New Hire or Re-Hire Documents

- Staff
- Student

#### Change-in-Status Documents

- Staff
  - Special Request
    - Request for Status
  - Changes in Appt. Info
    - Promotion
    - Demotion
    - Reclassification Upward
    - Reclassification Lateral
    - Reclassification Downward
    - Renewal of Appointment
    - Additional Employment
    - Lateral Transfer
    - Employment in Different Academic Series
    - Change from limited to Career Status
    - Change from Casual Restrict to Limited Status
  - Changes to Salary Info
    - Merit Increase
    - Change in Funding
    - Change in Percent of Full Time

- Six Month Increase
    - Limited Increase
    - Exceptional Equity Increase
    - Change in HSCP Negotiated Salary
    - Adding a Stipend
    - Other Payrate Change
  - Changes in Personal Info
    - Change in Personal Information
    - Change in Visa Type
    - Extension of Visa End Date
- Academic
  - Special Request
    - Request for Status
  - Changes in Appt. Info
    - Promotion
    - Demotion
    - Reclassification Upward
    - Reclassification Lateral
    - Reclassification Downward
    - Renewal of Appointment
    - Additional Employment
    - Lateral Transfer
    - Employment in Different Academic Series
    - Change from limited to Career Status
    - Change from Casual Restrict to Limited Status
  - Changes to Salary Info
    - Merit Increase
    - Change in Funding
    - Change in Percent of Full Time
    - Six Month Increase
    - Limited Increase
    - Exceptional Equity Increase
    - Change in HSCP Negotiated Salary
    - Adding a Stipend
    - Other Payrate Change
  - Changes in Personal Info
    - Change in Personal Information
    - Change in Visa Type
    - Extension of Visa End Date
- Student
  - Special Request
    - Request for Status
  - Changes in Appt. Info
    - Promotion
    - Demotion
    - Reclassification Upward
    - Reclassification Lateral

- Reclassification Downward
- Renewal of Appointment
- Additional Employment
- Lateral Transfer
- Employment in Different Academic Series
- Change from limited to Career Status
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- Changes to Salary Info
  - Merit Increase
  - Change in Funding
  - Change in Percent of Full Time
  - Six Month Increase
  - Limited Increase
  - Exceptional Equity Increase
  - Change in HSCP Negotiated Salary
  - Adding a Stipend
  - Other Payrate Change
- Changes in Personal Info
  - Change in Personal Information
  - Change in Visa Type
  - Extension of Visa End Date

#### Leave/Sabbatical Documents

- Staff-Leave
  - Leave of Absence Info
    - Leave of Absence with Full Pay
    - Leave of Absence with Partial Pay
    - Leave of Absence without Pay
  - Sabbatical Leave Info
    - Sabbatical Leave at Full Salary
    - Sabbatical Leave at partial Salary
    - Sabbatical Leave in Residence
- Academic-Leave/Sabbatical
  - Leave of Absence Info
    - Leave of Absence with Full Pay
    - Leave of Absence with Partial Pay
    - Leave of Absence without Pay
  - Sabbatical Leave Info
    - Sabbatical Leave at Full Salary
    - Sabbatical Leave at partial Salary
    - Sabbatical Leave in Residence

#### Separation Documents

- Staff
- Academic
- Student
- Layoff

#### Personnel Summary Documents

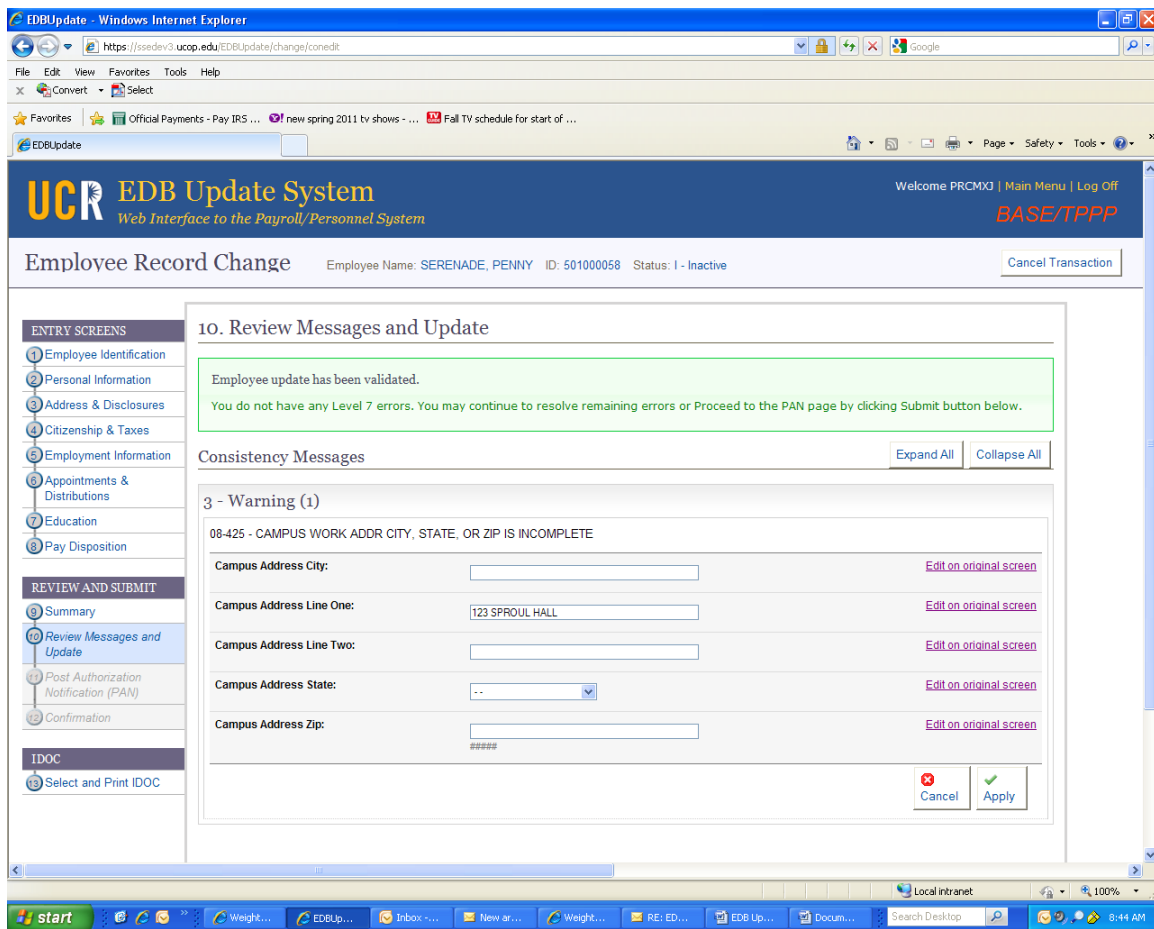
- All – Landscape

- All – Portrait

#### Benefits Summary Documents

- Benefits Enrollment
- Retirement and Savings

- Add special links or buttons to the Module bar areas that when clicked would open a help page that would contain information about the steps or critical fields needed for completion. More detail about this requirement will be included in the Phase III requirements document.
- Show the %, \$, +, @, #, &, (, ) symbols in the PAN comments on the Web EDB. These symbols are currently removed from the EDB PAN comments before they are written to the PAN database.
- If the campus address lines are partially filled, the field order on the review message page shows the city line before the street line. This should be changed so that the street line is before the city line.



In addition to the above stated enhancements, the following requests are campus specific and therefore should be parameterized:

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1. Place formatting rules on additional campus data elements – The entry boxes for additional data elements should have a limit on the field length and should provide formatting guidelines for data entry. The limit on the field length should match the data dictionary for that data element. Formatting guidelines should be under the field (e.g. 1.00 would be #. ##). If the field is a date field then a date picker should be placed next to it.
2. Allow campuses the ability to add all data elements that they currently have in their Base Payroll System. Also, allow campuses to specify field lengths and help text for custom data elements.
3. Allow campuses to designate campus specific data elements. These data elements must be associated with a Web EDB Panel. The data elements will be placed at the end of the screen. The order will be the same as defined in the campus customization property file.



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## **System Requirements:**

### **1.0 Overview of Modifications**

The modifications consist of various enhancements to the Web EDB Update System. Unless otherwise specified, the changes should impact all areas of this system – New Hire, Rehire, Changes, etc. Some of the changes will impact the Web EDB Inquiry as well. There is also a change to the Main Menu, to include a separate link for “IDOC.”

- Control Table Updates: None
- EDB Data Elements: None
- CICS Modifications: None
- Web Modifications. The following areas are impacted:
  - Main Menu – add IDOC to the Main Menu.
  - Left Navigation Menu – Remove IDOC.
  - Help. Help text modifications are needed. Note that detailed requirements for the module-level help described in the business needs will be included in SR83224 (Web EDB Update Phase III) instead of this SR.
  - Campus customization and Parameters
  - Templates
  - Suspend function
  - Appointments and Distributions
  - Employment Information
  - Citizenship and Taxes
  - Pay Disposition
  - Review Messages
  - PAN
  - IDOC
- One-time Processes: None
- EDB Maintenance: The web application and web services will utilize existing range/value edits, consistency edits and derivation processes.
- History Process: None
- Compute Process: None
- Distribution of Expense: None
- Consolidated Billing and Self-Billing: None
- Interface Files: None

- Forms: None
- Other Processes: None.
- Reporting and Notification: None.

## 2.0 Web Modifications

Web Modifications will touch most of the entry screens and some application-level functionality.

### 2.1 Main Menu

The IDOC choice should be added to the Main Menu, below the Intercampus Transfer choice. If the user clicks the IDOC choice, s/he should see an employee selection screen like the one displayed for the Employee Changes module. The same list of IDOCs that the user would see in New Hire or Changes should be available in this independent IDOC module. The security profiles for the IDOC application should mirror the current security profiles in CICS. Note that this Service Request includes requirements for an expanded list of IDOCs (see IDOC section below).

### 2.2 Data Element Customization

#### 2.2.1 Campus-specific Data Elements

Locations are currently able to add fields to the EDB Web Update application to meet their individual needs. These additional fields can currently appear only at the bottom of the Employment Information Screen. There is a need to allow campuses to designate the placement of local campus fields, instead of being limited to the Employment Information screen. Locations should be able to:

- add all data elements that they currently have in their PPS instance.
- specify on which EDB Web Update panel the local elements will appear.
- specify the order of the local data elements, if they have more than one on a given panel. These local data elements will appear at the bottom of the screen.
- specify a maximum length for their local fields as well as formatting guidelines for data entry. The limit on the field length should match the data dictionary for that data element. Formatting guidelines (e.g., ### or MM/DD/YY) should appear under the entry field. If the field is an MM/DD/YY date field, then a date picker should be placed next to it.
- specify help text for these local data elements

The following functionality should be available for custom fields:

#### Display types

- RADIO
- DROPDOWN
- TEXTFIELD
- DISPLAYONLY
- AUTOFILL

## Screens

- PERSONAL\_INFORMATION
- ADDRESS\_AND\_DISCLOSURES
- CITIZENSHIP\_AND\_TAXES
- EMPLOYMENT\_INFORMATION
- EDUCATION
- PAY\_DISPOSITION
- HONORS\_AND\_AWARDS

## Options

- Screen name
- DEN
- Label
- Required/Optional
- Maximum length
- Type (text, number, date etc)
- Hint, if any
- Map name, if any

## 2.3 Navigation Menu

The IDOC heading and “Select and Print IDOC” choice should be removed from the left navigation menu.

## 2.4 Templates

### 2.4.1 Saving templates

Currently, when a user is creating a template, and gives it the name of an existing template, the application automatically replaces the existing template with the new one. They may not even know that they selected an existing template name.

Template processing should be modified so that the user is notified when s/he tries to save a template, and the name already exists for that particular type of template (address, appointment, distribution). If the template already exists, a “Replace a Template” popup should be displayed with the message “Template “(template name)” already exists. To replace the template, click save. Otherwise, click cancel.” (see sample below for the look and feel of the user message) The pop-up should have cancel and save buttons.



If the user clicks “cancel,” the Replace a Template pop-up should close, and the Create a New Template pop-up should be displayed with the user-entered template name still filled in. The user can then change it to a different name as needed.

If the user clicks “save” then the existing template of that name should be replaced with the new one, and a confirmation should be displayed as shown in the sample below. When they click “OK”, the pop-up should close and the original Web EDB panel should be displayed.



## 2.5 Suspend Function

Modifications are requested in the areas of:

- Suspend behavior with an open appointment or distribution
- Recall suspended transaction message text

### 2.5.1 Suspend with Appointments and Distributions

Currently, when a user has an open (unsaved) appointment or distribution, and clicks the Suspend & Exit button, the transaction is suspended, but any unsaved appointment or distribution data is lost. However, when they click on one of the left navigation bar choices while an appointment or distribution is open, a pop-up appears with the message “Please save or cancel the update in progress” and the user must save or cancel before s/he is able to suspend the transaction.

When a preparer selects “suspend & Exit” from the Appointments and Distributions page while an appointment or distribution is open, the message “Please save or cancel the update in progress” should be displayed, to be consistent with the navigation bar behavior described above. The “Suspend & Exit” button should **not** be dimmed. The user will have to cancel or save the open appointment or distribution prior to suspending the transaction.

### 2.5.2 Recall Suspended Transactions Message Text

Currently, when the user recalls a suspended transaction, the message in the pop-up reads:

“Below is a list of your suspended transactions. Select one from the list and click the **"Use"** button to resume.”

The message should be changed to read:

“Below is a list of your suspended transactions. Select one transaction from the list and click the **"Use"** button to resume. Note that a transaction that has been taken out of suspense will not appear on the list of suspended items unless you suspend it again.”

## 2.6 Appointments and Distributions

The distribution copy function should be enhanced.

### 2.6.1 Distribution Copy Function

Currently, when the user clicks the copy icon next to an existing distribution on the Appointments and Distributions page, the system will automatically assign the next available distribution number within the same appointment. The user can change that distribution number, as needed, to another available distribution number, either within that same appointment or within another existing appointment.

However, when an appointment is already “full” and the user clicks the “Copy” button next to one of those eight distributions (11-18), an error message “You’ve reached the maximum number” is issued, and the only choice is to click on a “cancel” button. The copy distribution operation does not work if the appointment is full.

The distribution copy function should be modified as follows:

If the user attempts to copy a distribution from an appointment that already contains eight distributions (i.e., the maximum number of distribution has been reached), they should be presented with the following message: "This appointment already contains the maximum number of distributions. Please indicate to which appointment the distribution should be copied by selecting from the list below:"

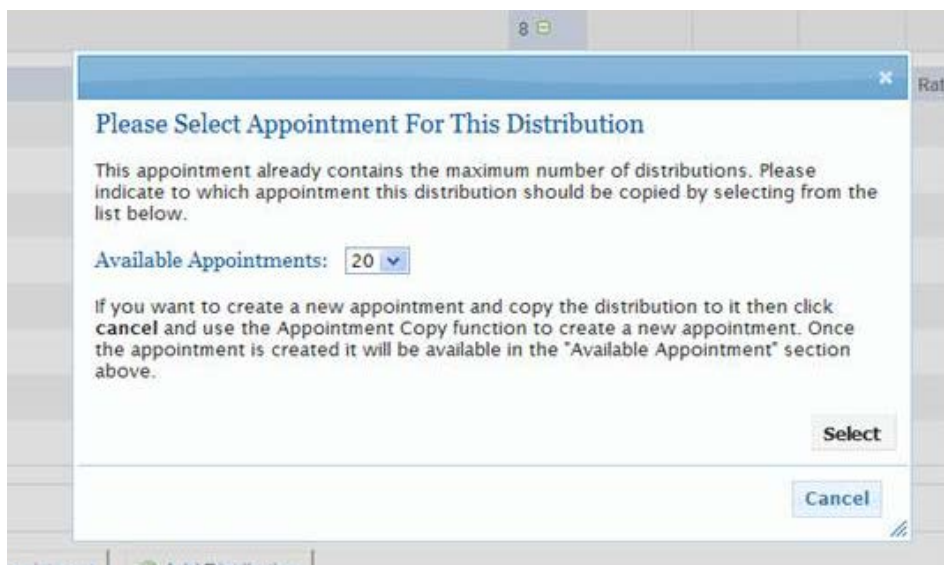
The pop-up should include a drop-down list containing all appointments that have available distribution spaces. Appointments that contain the maximum number of distributions should not be contained in the list of available appointments.

If there are no appointments with available space, then the drop-down should contain the single entry “no appointments available” and the Select button should **not** be active.

Additional text should appear below the list of available appointments:

“If you want to create a new appointment and copy the distribution to it, then click Cancel and use the Appointment Copy function to create the new appointment. Once the appointment is created, it will be available in the “Available Appointment” section above.”

The following illustration depicts the recommended look and feel of the user message.



If the user selects an appointment and clicks the “Select” button, the distribution should be copied to the next available distribution number within the chosen appointment. The “Add Distribution” page should be opened so they can make changes as needed. They have the option to change the distribution number at that time, if necessary.

If the user selects “Cancel” then the pop-up should close and the user should be on the Appointments and Distributions page.

## **2.7 Employment Information**

The E-Verify Status EDB1165 and E-Verify Date EDB1164 fields should be added to the Employment Information page. The fields should be below the I-9 Signature Date. E-Verify Date should be first, followed by E-Verify Status. (See Attachment A.)

The help text for these fields should match the help text for the same fields in CICS.

## **2.8 Citizenship and Taxes**

### **2.8.1 Help Updates**

On Web EDB Update, Web New Hire and Web Rehire, the word “form” should be capitalized in the description on the Citizenship Code N help.

The help text currently reads:

N – Non-Resident Alien, wages subject to withholding tax; income reported on form W-2. Limited to claiming Single with one exemption.

## **2.9 Pay Disposition**

The bank account format should be displayed on the Pay Disposition screen.

### **2.9.1 Display Bank Account Format**

Currently the Pay Disposition page does not display the valid bank account format. To facilitate data entry, the correct bank account format should be displayed below the bank account number field on the Pay Disposition field (see Attachment B). Since the bank account format is specific to the bank and the type of account (checking or savings), it can only be retrieved after the user enters the Direct Deposit Bank Table Key and a Checking/Savings Indicator of “C” or “S.”

The Bank Account Number field should be locked for user entry until a valid Direct Deposit Bank Table Key and a Checking/Savings Indicator of “C” or “S” has been entered. Once these fields are populated with valid values, the application should obtain the bank account format from the Direct Deposit Bank Table and display the format underneath the Bank Account Number field. At that time, the Bank Account Number field should be opened for entry.

### **2.10 Review Messages**

On the Review Messages page, when the “08-425 - CAMPUS WORK ADDR CITY, STATE, OR ZIP IS INCOMPLETE” message is displayed and the user clicks the “fix” button, the City is displayed first, before Campus Address Line One. This should be modified so that the Campus Address City is displayed between the Campus Address Line Two and the Campus Address State.

## **2.11 Post Authorization Notice (PAN)**

Changes to the PAN include PAN recipient duplicate entry handling and retention of special characters in the PAN comments.

### **2.11.1 PAN Recipients**

Currently, if the user enters a User ID in the Add Recipients by User ID, and that User ID already exists in the list of PAN recipients, no message is issued. The User ID is not added again, and the entry field is blanked out.

Currently, when the user enters an email address that already exists in the list of PAN recipients, the application adds the duplicate email address to the list and does not issue an error message.

If the user enters a User ID or Email address that already exists in the PAN recipient list, then the User ID or Email address should remain in the box, and a pop-up message should be displayed “Duplicate Entry. Entry already exists.” Duplicate userids/Email addresses should not be added to the list.

### **2.11.2 PAN Comments Special Characters**

Currently, if the user enters special characters in the PAN comments, those symbols are stripped out of the PAN comments and they do not appear in the PAN email.

If the % , \$, +, @, #, &, (, ) symbols are entered in the PAN comments, they should not be stripped out. They should be retained and should appear in the PAN email.

## **2.12 IDOC**

### **2.12.1 Additional IDOC Documents**

The IDOC function should be enhanced to include all IDOCs that are currently available in CICS. See Attachment C for the complete list of IDOCs.

### **2.12.2 IDOC Functionality in Web New Hire**

Although the IDOC is being removed from the left navigation menu, it will still be available once the new hire transaction has been submitted to PPS, as it is today. However, the buttons within the Select and Print IDOC page should be standardized, so that the user sees the same buttons regardless of whether they came from New Hire, Changes or the IDOC link on the PPS Web main menu.

Standard button options should include:

1. EDB Inquiry
2. EDB Change
3. New Hire
4. Main Menu

This will allow the user to go back and forth between New Hire and Employee Changes without going through the main menu.



### **2.12.3 IDOC Functionality in Employee Changes**

The IDOC function should still be available to the user once the change transaction has been submitted to PPS, as it is today.

Currently in the Employee Changes application, the user can return to the same record after printing the IDOC. Modifications will be needed so that the user cannot return to the same employee after printing the IDOC. The user will need to re-select the employee in order to make further changes to the record.









In addition, the buttons within the “Select and Print IDOC” should be standardized, so the user will see the following buttons regardless of whether they came from New Hire, Changes, or the Main Menu IDOC link:

1. EDB Inquiry
2. EDB Change
3. New Hire
4. Main Menu

## Attachment A – Employment Information Page – E-Verify

### 5. Employment Information

---

<b>* <u>Most Recent Date of Hire:</u></b>	<input type="text"/>  MM/DD/YY
<b><u>Original Date of Hire:</u></b>	<input type="text"/>  MM/DD/YY
<b><u>Oath Signature Date:</u></b>	<input type="text"/>  MM/DD/YY
<b><u>I-9 Signature Date:</u></b>	<input type="text"/>  MM/DD/YY
<b><u>E-Verify Date:</u></b>	<input type="text"/>  MM/DD/YY
<b><u>E-Verify Status:</u></b>	<input type="text" value="-"/> 
<b>* <u>BELI (Assigned):</u></b>	<input type="text" value="-"/> 
<b>* <u>BELI Effective Date:</u></b>	<input type="text"/>  MM/DD/YY

## Attachment B – Pay Disposition Page – Bank Account Format

Direct Deposit Bank Table Key

BOFAN - BANK OF AMERICA-NORTH

Begin typing name of bank

Checking/Savings Indicator

C - Checking ▼

Bank Account Number

12345-98765

##### - #####

## Attachment C – IDOC

List of IDOCs (the bold items are the IDOCs that should be added to the Web EDB Update application):

### New Hire or Re-Hire Documents

- Staff
- Student

### Change-in-Status Documents

- Staff
  - Special Request
    - Request for Status
  - Changes in Appt. Info
    - **Promotion**
    - **Demotion**
    - **Reclassification Upward**
    - **Reclassification Lateral**
    - **Reclassification Downward**
    - **Renewal of Appointment**
    - **Additional Employment**
    - **Lateral Transfer**
    - **Employment in Different Academic Series**
    - **Change from limited to Career Status**
    - **Change from Casual Restrict to Limited Status**
  - Changes to Salary Info
    - **Merit Increase**
    - **Change in Funding**
    - **Change in Percent of Full Time**
    - **Six Month Increase**
    - **Limited Increase**
    - **Exceptional Equity Increase**
    - **Change in HSCP Negotiated Salary**
    - **Adding a Stipend**
    - **Other Payrate Change**
  - Changes in Personal Info
    - **Change in Personal Information**
    - **Change in Visa Type**
    - **Extension of Visa End Date**
- Academic
  - Special Request
    - Request for Status
  - Changes in Appt. Info
    - **Promotion**
    - **Demotion**
    - **Reclassification Upward**

- **Reclassification Lateral**
    - **Reclassification Downward**
    - **Renewal of Appointment**
    - **Additional Employment**
    - **Lateral Transfer**
    - **Employment in Different Academic Series**
    - **Change from limited to Career Status**
    - **Change from Casual Restrict to Limited Status**
  - Changes to Salary Info
    - **Merit Increase**
    - **Change in Funding**
    - **Change in Percent of Full Time**
    - **Six Month Increase**
    - **Limited Increase**
    - **Exceptional Equity Increase**
    - **Change in HSCP Negotiated Salary**
    - **Adding a Stipend**
    - **Other Payrate Change**
  - Changes in Personal Info
    - **Change in Personal Information**
    - **Change in Visa Type**
    - **Extension of Visa End Date**
- Student
  - Special Request
    - Request for Status
  - Changes in Appt. Info
    - **Promotion**
    - **Demotion**
    - **Reclassification Upward**
    - **Reclassification Lateral**
    - **Reclassification Downward**
    - **Renewal of Appointment**
    - **Additional Employment**
    - **Lateral Transfer**
    - **Employment in Different Academic Series**
    - **Change from limited to Career Status**
    - **Change from Casual Restrict to Limited Status**
  - Changes to Salary Info
    - **Merit Increase**
    - **Change in Funding**
    - **Change in Percent of Full Time**
    - **Six Month Increase**
    - **Limited Increase**
    - **Exceptional Equity Increase**
    - **Change in HSCP Negotiated Salary**
    - **Adding a Stipend**
    - **Other Payrate Change**
  - Changes in Personal Info

- **Change in Personal Information**
- **Change in Visa Type**
- **Extension of Visa End Date**

#### Leave/Sabbatical Documents

- **Staff-Leave**
  - Leave of Absence Info
    - **Leave of Absence with Full Pay**
    - **Leave of Absence with Partial Pay**
    - **Leave of Absence without Pay**
  - Sabbatical Leave Info
    - **Sabbatical Leave at Full Salary**
    - **Sabbatical Leave at partial Salary**
    - **Sabbatical Leave in Residence**
- **Academic-Leave/Sabbatical**
  - Leave of Absence Info
    - **Leave of Absence with Full Pay**
    - **Leave of Absence with Partial Pay**
    - **Leave of Absence without Pay**
  - Sabbatical Leave Info
    - **Sabbatical Leave at Full Salary**
    - **Sabbatical Leave at partial Salary**
    - **Sabbatical Leave in Residence**

#### Separation Documents

- **Staff**
- **Academic**
- **Student**
- **Layoff**

#### Personnel Summary Documents

- All – Landscape
- All – Portrait

#### Benefits Summary Documents

- Benefits Enrollment
- Retirement and Savings



**UC HR/BENEFITS - INFORMATION SYSTEMS SUPPORT**  
**SERVICE REQUEST**  
**UIRC 160ISS (R 01/00)**

**SR83214**

DATE 12/15/10	DATE/CYCLE DUE	ESTIMATE REQUIRED? <input type="checkbox"/> YES <input type="checkbox"/> NO
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PERSON AUTHORIZING REQUEST: <b>Michael O'Neill</b>	SYSTEMS CONTACT: <b>Marcia Johnson</b>
DEPARTMENT: <b>Payroll Coordination</b>	RECHARGE NO.: <b>NR-Payroll</b>
REQUESTOR: <b>Marcia Johnson</b>	SYSTEMS/FILES/PROGRAMS: <b>WEB</b>

RETRIEVAL/SYSTEM MODIFICATION: (Description of Request)  
**Enhancements to Web EDB System**

SYSTEM	EFFECTIVE DATE OF INFORMATION	PRODUCTION RUN	TYPE OF RUN	TYPE OF OUTPUT
			<input type="checkbox"/> RERUN	<input type="checkbox"/> ADD'L <input type="checkbox"/> REPORT <input type="checkbox"/> EXTRACT FILE <input type="checkbox"/> LABELS

RETRIEVAL/PRODUCTION RUN  
 DISTRIBUTION OF OUTPUT INSTRUCTIONS (FOR RETRIEVAL REQUESTS, INCLUDE LONG TERM FILE RETENTION INSTRUCTIONS IF APPROPRIATE)

IR&C USE ONLY

<input type="checkbox"/> R	<input type="checkbox"/> NR	<input type="checkbox"/> IM STAFF	TO:	<input type="checkbox"/> RET	<input type="checkbox"/> CORP SYS	<input type="checkbox"/> MIS/O	<input type="checkbox"/> PAYROLL	<input type="checkbox"/> PRODUCTION CONTROL
DATE RECEIVED	REVERSED DUE DATE	DATE COMPLETED	COMPLETED BY	COMPUTING TIME/CHARGES	STAFF TIME-CHARGES	BILLING NO.	JOB NAME	
COMMENTS:								
ESTIMATE INFORMATION	COMPLETION DATE	STAFF HOURS	ESTIMATED COSTS	COMPUTING COSTS	ESTIMATED TOTAL COSTS			
		\$	\$	\$				

APPROVAL TO PROCEED		2/1/11	(NAME, TITLE, ADDRESS)
BASED ON ESTIMATE	(SIGNATURE)		