

Business Requirements Document

SR83667 CUE - IBT Dues and Fees Rate Updates

Information Technology Services

Office of the President

Document Information

Document Attributes	Information
ID	SR83667
Owner	Payroll Coordination and Tax Services
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Revision History

Version	Issue Date	Changes
1.0	4/05/12	Initial Version
1.1	4/09/12	Beth Burkart – added UPAY forms. Removed sections: Assumptions and Constraints, Outstanding Items. Filled in Functional Requirements.
1.2	05/09/12	Shaun Ruiz – updated UPAY forms.

Document Approvals

Role	Name	Signature	Date
Associate Vice President and System-wide Controller	Peggy Arrivas		
Manager-Payroll Coordinator	Shaun Ruiz	(approved via Issue Tracker)	4/10/12

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1 Overview

Update the Dues and Fees rates for the CX Unit represented by the CUE -IBT.

1.1 Background

The CUE - IBT notified the University of their desire to increase the Dues/Fees for represented employees in the CX Unit. For Dues, deduction percentage is to be increased from .50% to .80% of Total Gross. For Fees and CO Charities, deduction percentage is to be increased from .475% to .775% of Total Gross. The increases are effective with May 2012 earnings.

1.2 Objectives

Implement changes in time to be effective with May 2012 earnings.

SM May 1-15 May 23, 2012

MO May 1-31 June 1, 2012

BW May 13-26 June 6, 2012

1.3 Related Projects & Dependencies

None.

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1.4 Stakeholders

Acronym	Description	Role
*	Authorize	Has ultimate signing authority for any changes to the document
R	Responsible	Responsible for creating this document
A	Accountable	Accountable for accuracy of this document (e.g. project manager)
S	Supports	Provides supporting services in the production of this document
C	Consulted	Provides input
I	Informed	Must be informed of any changes

Name	Position	*	R	A	S	C	I
Shaun Ruiz	Payroll Coordinator	X			X	X	X
Jaime Espinoza	Analyst		X	X		X	X
Karren Yun	Labor Relation Manager				X	X	X
Jennifer Damico-Murphy	HR Manager						X

1.5 Proposed Strategy

The following GTNs will be updated as per the three attached UPAY712 forms.

GTN Number: Description:

- 374 CX Dues
- 455 CX Agency Fee
- 491 CUE PED AIDS
- 492 CUE KOMEN FN
- 493 CUE OX FAM

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1.6 Glossary

Term	Description
CUE - IBT	Coalition of University Employees – International Brotherhood of Teamsters
CO	Conscientious Objector
CX	Clerical

2 Product/Solution Scope

N/A

3 Business Services and Processes

N/A

4 Business Rules

N/A

5 Business Requirements

5.1 User Requirements

N/A

5.2 Functional Requirements

Req ID	Requirement Type	Requirement Description	Priority [L/M/H]	Comments
R0001	Control Table Update	Update Benefits Rates Table per the attached UPAY forms	H	

5.3 Reporting Requirements

N/A

6 Non-Functional Requirements

N/A

7 External References

N/A

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UPAY Forms



BENEFITS RATES TABLE GROSS-TO-NET RATES/AMOUNTS FORMAT 001 & 002 & 003 UPAY712 (R12/06) R1744

1 of 3

A/D	1	2	3	4	6	7	9	10	18	19	27
FORMAT	GTN NO	RATE / AMOUNT									
14	001							*			
14	001							*			
14	001							*			
14	001							*			

A/D	1	2	3	4	6	7	9	10	18	19	27
FORMAT	GTN NO	RATE / AMOUNT									
C	14	002	374	00000	8000	99999	99999	*			
C	14	002	455	00000	7750	99999	99999	*			
C	14	002	491	00000	7750	99999	99999	*			
C	14	002	492	00000	7750	99999	99999	*			

A/D	1	2	3	4	6	7	9	10	18	19	27	28	36	37	45	46	54
FORMAT	GTN NO	RATE / AMOUNT										CAP	DEDUCTION PERCENT	REDUCED DEDUCTION AMOUNT	THRESHOLD PERCENT		
14	003							*				*	*	*	*	*	*
14	003							*				*	*	*	*	*	*
14	003							*				*	*	*	*	*	*
14	003							*				*	*	*	*	*	*

BUC	R	S	D	EFFECTIVE DATE
E H U	P C C	66	MM DD YY	71
61 62	63 64 65			

BUC	R	S	D	EFFECTIVE DATE
E H U	P C C	66	MM DD YY	71
61 62	63 64 65			
CXC			050112	
CXC			050112	
CXC			050112	
CXC			050112	

BUC	R	S	D	EFFECTIVE DATE
E H U	P C C	66	MM DD YY	71
61 62	63 64 65			

A percentage should be entered with the integers prior to the implied decimal; for example, 15% should be entered as 00015.0000.

PREPARED BY: JAIME ESPINOZA DATE: 4/5/12 APPROVED BY: [Signature] DATE: 4/5/12

RETENTION: ACCOUNTING: UNTIL ACTION TAKEN

5/9/12 - updated CAP section. [Signature]

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BENEFITS RATES TABLE GROSS-TO-NET RATES/AMOUNTS FORMAT 001 & 002 & 003 UPAY712 (R12/06) R1744

2 of 3

A/D	1	2	3	4	6	7	9	10	RATE / AMOUNT
	14	001							
	14	001							
	14	001							
	14	001							

A/D	1	2	3	4	6	7	9	10	RATE / AMOUNT	CAP	
C	14	002			493				0000	7750	99999.9999
C	14	002			493				0000	7750	99999.9999
C	14	002			492				0000	7750	99999.9999
C	14	002			491				0000	7750	99999.9999

A/D	1	2	3	4	6	7	9	10	RATE / AMOUNT	CAP	DEDUCTION PERCENT	REDUCED DEDUCTION AMOUNT	THRESHOLD PERCENT
	14	003									27.28	36.37	45.46
	14	003									*	*	*
	14	003									*	*	*
	14	003									*	*	*

BUC	R	S	D	EFFECTIVE DATE
61 62	63	64	65	MM DD YY
61 62	63	64	65	71

BUC	R	S	D	EFFECTIVE DATE
61 62	63	64	65	MM DD YY
61 62	63	64	65	71
CXC				05/01/12
00				05/01/12
00				05/01/12
00				05/01/12

BUC	R	S	D	EFFECTIVE DATE
61 62	63	64	65	MM DD YY
61 62	63	64	65	71

A percentage should be entered with the integers prior to the implied decimal; for example, 15% should be entered as 0015.0000.

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BENEFITS RATES TABLE GROSS-TO-NET RATES/AMOUNTS FORMAT 001 & 002 & 003 UPAY712 (R12/06) R1744

3 of 3

A percentage should be entered with the integers prior to the implied decimal; for example, 15% should be entered as 00015.0000.



A/D	1	2	3	4	6	7	9	10	15
	14	001							*
	14	001							*
	14	001							*
	14	001							*

A/D	1	2	3	4	6	7	9	10	18	19	27
C	14	002	455	0000	7750				9999	9999	*
C	14	002	374	0000	8000				9999	9999	*
	14	002							*	*	*
	14	002							*	*	*

A/D	1	2	3	4	6	7	9	10	18	19	27	28	36	37	45	46
	14	003							*	*	*	*	*	*	*	*
	14	003							*	*	*	*	*	*	*	*
	14	003							*	*	*	*	*	*	*	*
	14	003							*	*	*	*	*	*	*	*

BUC	R	S	I	D	EFFECTIVE DATE
E	H	U	P	C	MM DD YY
61	62	63	64	65	66 71

BUC	R	S	I	D	EFFECTIVE DATE
E	H	U	P	C	MM DD YY
61	62	63	64	65	66 71
00					05 01 12
00					05 01 12

BUC	R	S	I	D	EFFECTIVE DATE
E	H	U	P	C	MM DD YY
61	62	63	64	65	66 71

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