

Business Requirements Document

SR83748 – PX Fair Share Increase

Information Technology Services

Office of the President

Document Information

Document Attributes	Information
ID	SR83748
Owner	Payroll Coordination
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Revision History

Version	Issue Date	Changes
1.0	8/2/12	Initial Draft
1.1	8/3/12	B. Burkart – added UPAY forms to BRD. Added functional requirements.
1.2	8/6/12	B. Burkart – deleted some unneeded sections.
1.3	8/7/12	Change # of UPAY forms in section 1.5

Document Approvals

Role	Name	Signature	Date
Associate Vice President & Systemwide Controller	Peggy Arrivas		

Table of Contents

1 Overview4

2 Product/Solution Scope5

3 Business Services and Processes6

4 Business Rules6

5 Business Requirements6

6 Non-Functional Requirements7

7 External References7

1 Overview

Increase PX Fair Share Fee and Conscientious Objectors charity deduction amount.

1.1 Background

On July 18, 2012, UAW Local 5810 noticed the University to increase the Fair Share Fee payroll deduction amount from 0.9% to 0.95% for the covered PX Unit. This increase also applies to the “Conscientious Objectors” (CO) charity deductions.

1.2 Objectives

To increase the Fair Share Fee and Conscientious Objectors payroll deduction amount from 0.9% to 0.95% for the covered PX Unit.

1.3 Related Projects & Dependencies

Updates must be fully implemented to effect August 2012 earnings paid August 31, 2012.

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

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Name	Position	*	R	A	S	C	I
Shaun Ruiz	Payroll Coordinator	X			X	X	X
Jaime Espinoza	Principal Analyst		X	X			X
Karren Yun	Labor Relations Manager					X	X
Elizabeth Burkart	Programmer Analyst - ITS				X		X

1.5 Proposed Strategy

Effective with August 2012 earnings, Paid August 31, 2012, agency fees and related charitable deductions are to be based on a rate of .95%. The following GTNs will be updated as per the three attached UPAY712 forms.

GTN Number: Description

- 475 (PX AGENCY FEE)
- 524 AMER CNCR SO
- 525 HABITAT
- 526 (OXFAM)
- 527 (AMER CNCR SO - SAN DIEGO ONLY)
- 528 (HABITAT - SAN DIEGO ONLY)

1.6 Glossary

Term	Description
PX	PostDoctoral Bargaining Unit
UAW	International Union, United Automobile, Aerospace & Agricultural Implement Workers of America
CO	Conscientious Objectors
GTN	Gross To Net

2 Product/Solution Scope

Updates to Benefits Rates Table.

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2.1 Included in Scope

Control Table updates

2.2 Excluded from Scope

N/A

2.3 Assumptions & Constraints

none

2.4 Outstanding Items

none

3 Business Services and Processes

N/A

4 Business Rules

N/A

5 Business Requirements

< Describes a high level need originating from the business that the product or solution must fulfill >

5.1 User Requirements

N/A

5.2 Functional Requirements

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

6 Non-Functional Requirements

N/A

7 External References

N/A

143

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

(Updated 05/2012 to remove unused Effective Date field)



A/C/D	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18

A/C/D	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18

* *

- Important Notes:**
- Percentage values must be entered with the integer values positioned in front of the asterisk (*), which is preprinted on the form and represents an implied decimal; for example, 15% would be entered as 00015*0000.
 - When a rate change is being applied in the "002" and "003" formats, a value in the CAP field is required, even when the CAP value does not change. Leaving the CAP field blank will cause the existing CAP field value to be zeroed out.
 - Format 002 must be used when the Calculation Routine for the GTN is 15; if the deduction has no cap, enter all 9s for the cap. Format 001 can be used when there is no Calculation Routine.

* Alcampuses except SANDIEGO

BUC	R	S	D
61	62	63	64

BUC	R	S	D
61	62	63	64
00			
PX	C		
00			
PX	C		

BUC	R	S	D
61	62	63	64

A/C/D	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18

PREPARED BY: JAME ESPINOZA DATE: 8/2/12

APPROVED BY: [Signature] DATE: 8/2/12

RETENTION: ACCOUNTING: UNTIL ACTION TAKEN

2 of 3

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

(Updated 05/2012 to remove unused Effective Date field)



A/CID	1	2	3	4	6	7	9	10	18	19	27
		14	001						*		
		14	001						*		
		14	001						*		
		14	001						*		

A/CID	1	2	3	4	6	7	9	10	18	19	27
C		14	002			525		0000	*9500		9999 *9999
C		14	002			525		0000	*9500		9999 *9999
C		14	002			526		0000	*9500		9999 *9999
C		14	002			526		0000	*9500		9999 *9999

* *

Important Notes:

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* ALL Campuses Except SAN DIEGO

BUC	R	S	D
61	62		

BUC	R	S	D
61	62		
	00		
	PX	C	
	00		
	PX	C	

BUC	R	S	D
61	62		

A/CID	1	2	3	4	6	7	9	10	18	19	27	28	36	37	46	54
		14	003						*				*			
		14	003						*				*			
		14	003						*				*			
		14	003						*				*			

PREPARED BY: Saimc Espinoza DATE: 8/2/11 APPROVED BY: [Signature] DATE: 8/2/12

3 of 3



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

(Updated 05/2012 to remove unused Effective Date field)

A/C/D	1	2	3	4	6	7	9	10	18
		14	001					*	
		14	001					*	
		14	001					*	
		14	001					*	

A/C/D	1	2	3	4	6	7	9	10	18
*	C	14	002	527	00000	9500	99999	*	9999
*	C	14	002	527	00000	9500	99999	*	9999
*	C	14	002	528	00000	9500	99999	*	9999
*	C	14	002	528	00000	9500	99999	*	9999

A/C/D	1	2	3	4	6	7	9	10	18
		14	003					*	
		14	003					*	
		14	003					*	
		14	003					*	

BUC	81	62	63	64	65

BUC	81	62	63	64	65

BUC	81	62	63	64	65

Important Notes:

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- Format 002 must be used when the Calculation Routine for the GTN is 15; if the deduction has no cap, enter all 9s for the cap. Format 001 can be used when there is no Calculation Routine.

* SAN Diego Only

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