

Business Requirements Document

SR83962 – 2013 PX Fair Share & CO Update

Information Technology Services

Office of the President

Document Information

Document Attributes	Information
ID	SR83962
Owner	Payroll Coordination
Author(s)	Jaime Espinoza
Contributor(s)	

Revision History

Version	Issue Date	Changes
1.0	7/22/13	Initial Draft
1.1	7/29/13	B. Burkart – added UPAY forms and updated functional requirements section.

Document Approvals

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

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1 Overview

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

1.1 Background

On July 19, 2013, UAW Local 5810 noticed the University to decrease the Fair Share Fee payroll deduction amount from 0.95% to 0.80% for the covered PX Unit. This decrease also applies to the “Conscientious Objectors” (CO) charity deductions.

1.2 Objectives

To decrease the Fair Share Fee and Conscientious Objectors payroll deduction amount from 0.95% to 0.80% for the covered PX Unit.

1.3 Related Projects & Dependencies

Updates must be fully implemented to effect August 2013 earnings paid August 30, 2013.

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 2013 earnings, Paid August 30, 2013, agency fees and related charitable deductions are to be based on a rate of 0.80%. 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

2.1 Included in Scope

Control Table Updates

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2.2 Excluded from Scope

2.3 Assumptions & Constraints

ID	Assumption / Constraint

2.4 Outstanding Items

ID	Description

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 updates	Update Benefits Rates Table per attached UPAY712	H	

6 Non-Functional Requirements

N/A

7 External References

N/A



**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)

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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.

* * * All Campuses Except San Diego * * *

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

A/C/D	FORMAT	GTN NO	RATE /AMOUNT	CAP
1	2 3 4	6 7	9 10 18	19 27
C	14 002	475	00000 *8000	99999 *9999
C	14 002	475	00000 *8000	99999 *9999
C	14 002	524	00000 *8000	99999 *9999
C	14 002	524	00000 *8000	99999 *9999

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

BUC	R	S	H	U
61 62	P	C	C	C
63 64 65				

BUC	R	S	H	U
61 62	P	C	C	C
63 64 65				

BUC	R	S	H	U
61 62	P	C	C	C
63 64 65				

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RETENTION: ACCOUNTING UNTIL ACTION TAKEN



**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)

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- 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.

* All Campuses Except San Diego

A/C/D	FORMAT	GTN NO	RATE /AMOUNT	CAP
1	2 3 4	6 7	9 10 * 1 8	
	14 001			*
	14 001			*
	14 001			*

A/C/D	FORMAT	GTN NO	RATE /AMOUNT	CAP
1	2 3 4	6 7	9 10 * 1 8	
C	14 002	525	00000 *8000	99999 *5999
C	14 002	525	00000 *8000	99999 *5999
C	14 002	526	00000 *8000	99999 *5999
C	14 002	526	00000 *8000	99999 *5999

A/C/D	FORMAT	GTN NO	RATE /AMOUNT	CAP	DEDUCTION PERCENT	REDUCED DEDUCTION AMOUNT	THRESHOLD PERCENT
1	2 3 4	6 7	9 10 * 1 8				
	14 003			*			*
	14 003			*			*
	14 003			*			*
	14 003			*			*

BUC	R	S	D
61 62	P	H	U
	C	H	U
	C	C	C

BUC	R	S	D
61 62	P	H	U
	C	H	U
	C	C	C

BUC	R	S	D
61 62	P	H	U
	C	H	U
	C	C	C

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RETENTION: ACCOUNTING: UNTIL ACTION TAKEN



**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)

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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 0015*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.

* San Diego Only

AC/D	FORMAT	GTN NO	RATE /AMOUNT	CAP
1	2 3 4	6 7	9 10 1 8	1 9 1 2 7
	14 001		*	*
	14 001		*	*
	14 001		*	*

AC/D	FORMAT	GTN NO	RATE /AMOUNT	CAP
1	2 3 4	6 7	9 10 1 8	1 9 1 2 7
C	14 002	527	00000 *8000	99999 *9999
C	14 002	527	00000 *8000	99999 *9999
C	14 002	528	00000 *8000	99999 *9999

AC/D	FORMAT	GTN NO	RATE /AMOUNT	CAP	DEDUCTION PERCENT	REDUCED DEDUCTION AMOUNT	THRESHOLD PERCENT
1	2 3 4	6 7	9 10 1 8	1 9 1 2 7	2 8 3 6	3 7 4 5 4 6	5 4 5 4
	14 003		*	*	*	*	*
	14 003		*	*	*	*	*
	14 003		*	*	*	*	*

BUC	R	S	D
61 62	E P C C	H H C C	S H U C
	F3 F4 F5		

BUC	R	S	D
61 62	E P C C	H H C C	S H U C
	F3 F4 F5		

BUC	R	S	D
61 62	E P C C	H H C C	S H U C
	F3 F4 F5		

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RETENTION: ACCOUNTING: UNTIL ACTION TAKEN