

# **Business Requirements Document**

**SR83964 – 2013 BX Fair Share & CO Update**

# Information Technology Services

Office of the President

## Document Information

Document Attributes	Information
ID	SR83964
Owner	Payroll Coordination
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## Revision History

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

## Document Approvals

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

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## 1 Overview

Decrease BX 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 0.92% to 0.78% for the covered BX 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 0.92% to 0.78% for the covered BX Unit.

### 1.3 Related Projects & Dependencies

Updates must be fully implemented to effect first pay period beginning with August 2013 earnings. Pay cycles to be targeted by the proposed update.

- BW August 4, 2013 August 17, 2013 Paid August 28, 2013
- MO August 1, 2013 August 31, 2013 Paid August 30, 2013
- MA August 1, 2013 August 31, 2013 Paid September 6, 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 the first pay cycle beginning with August 2013 earnings, agency fees and related charitable deductions are to be based on a rate of 0.78%. The following GTNs will be updated as per the four attached UPAY712 forms.

### GTN Number: Description

- 474 (BX AGENCY FEE)
- 558 AMER CNCR SO
- 559 HABITAT
- 560 (OXFAM)

## 1.6 Glossary

Term	Description
BX	Academic Student Employees 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
<b>R0001</b>	Control Table update	Update Benefits Rates Table per the attached UPAY712	H	

## **6 Non-Functional Requirements**

**N/A**

## **7 External References**

**N/A**



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**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	FORMAT	GTN NO	RATE /AMOUNT
1	2 3 4	6 7	9 10,11,12,13,14,15,16,17,18
	14 001		*
	14 001		*
	14 001		*
	14 001		*

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

A/C/D	FORMAT	GTN NO	RATE /AMOUNT	CAP
1	2 3 4	6 7	9 10,11,12,13,14,15,16,17,18	19,20,21,22,23,24,25,26,27
C	14 002	474	0000 *7800	99999 * 9999
C	14 002	474	0000 *7800	99999 * 9999
C	14 002	474	0000 *7800	99999 * 9999
C	14 002	558	0000 *7800	99999 * 9999
C	14 002	558	0000 *7800	99999 * 9999

BUC	R	S	D
61 62	E P C C	H H C C	U U C C
	63 64 65		
	00	0X	00
	00		
	BX		

- 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.

A/C/D	FORMAT	GTN NO	RATE /AMOUNT	CAP	DEDUCTION PERCENT	REVISED DEDUCTION AMOUNT	THRESHOLD PERCENT
1	2 3 4	6 7	9 10,11,12,13,14,15,16,17,18	19,20,21,22,23,24,25,26,27	28,29,30,31,32,33,34,35,36,37	38,39,40,41,42,43,44,45,46	47,48,49,50,51,52,53,54
	14 003		*	*	*	*	*
	14 003		*	*	*	*	*
	14 003		*	*	*	*	*
	14 003		*	*	*	*	*

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

PREPARED BY: SARAI ESPINOZA DATE: 7/22/13 APPROVED BY: [Signature] DATE: 7/23/13

RETENTION: ACCOUNTING: UNTIL ACTION TAKEN





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

(Updated 06/2012 to remove unused Effective Date field)

**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.

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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.

ACCD	FORMAT	GTN NO	RATE /AMOUNT	CAP
1	2 3 4 6 7	9 10 11 12 13 14 15 16 17 18		
	14 001		*	
	14 001		*	
	14 001		*	

ACCD	FORMAT	GTN NO	RATE /AMOUNT	CAP
1	2 3 4 6 7	9 10 11 12 13 14 15 16 17 18		
	14 002		00000 *7800	99999 *9999
	14 002		00000 *7800	99999 *9999
	14 002		00000 *7800	99999 *9999
	14 002		00000 *7800	99999 *9999

ACCD	FORMAT	GTN NO	RATE /AMOUNT	CAP	DEDUCTION PERCENT	REDUCED DEDUCTION AMOUNT	THRESHOLD PERCENT
1	2 3 4 6 7	9 10 11 12 13 14 15 16 17 18			19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50		
	14 003		*	*	*	*	*
	14 003		*	*	*	*	*
	14 003		*	*	*	*	*

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

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

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

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