

## **Business Requirements Document**

**SR83882 Removal of 3254-PostDoc Paid Directs from the  
Standard Deduction Report**

# Information Technology Services

Office of the President

## Document Information

Document Attributes	Information
ID	SR83882
Owner	Payroll Coordination
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Contributor(s)	

## Revision History

Version	Issue Date	Changes
1.0	2/20/14	Initial Draft
1.1	3/19/14	B. Burkart – started functional requirements. Added scope. Added examples.
1.2	3/19/14	Jaime – updated some wording.
1.3	3/24/14	B. Burkart – tab-delimited file requirements
1.4	5/1/14	B. Burkart – added UPAY form for PDE DOS code changes required by the technical design.

## Document Approvals

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

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## 1 Overview

UAW Local 5810 would like the \$0.07 service fee assessed in the Standard Union Deduction Report to be **ONLY** charged to postdocs that have dues/fees deductions remitted. In order to accommodate this request, UAW Local 5810 was advised by Labor that in order to accomplish this, title code 3254 PostDoc-Paid Directs would no longer be reported on the Standard Union Deduction Report.

### 1.1 Background

Release 1966 established the dues, agency fees and charity fees deduction process for the PX bargaining unit. A unique dues, agency fees and charity fees calculation routine was developed along with new DOS codes and reporting requirements.

### 1.2 Objectives

To remove 3254-PostDoc Paid Directs from the PPP4951 Standard Deduction Report.

### 1.3 Related Projects & Dependencies

- The removal of 3254-PostDoc Paid Directs from the PPP4951 Standard Deduction Report should be completed ASAP.

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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
Jaime Espinoza	Payroll Coordination		X	X		X	X
Elizabeth Burkart	ITS Business Analyst				X	X	X
Karren Yun	Labor Relations Manager					X	X

## 1.5 Proposed Strategy

- Remove Title Code 3254-PostDoc Paid Direct Scholars from the Standard Union Deduction Report.
- Modify the dues, agency fees and charity fees calculation routine developed for the PX unit to exclude 3254-PostDoc Paid Direct non-paying distributions from the “in-unit” sum.
- As dues/fees will no longer be calculated for 3254 earnings, “Not Taken” amounts (the difference of the Total Deduction Amount and the Remit Amount) for 3254 earnings will no longer exist and all references to them should be removed from existing reports and tab-delimited files.

## 1.6 Glossary

Term	Description
UAW	United Auto Workers
PX	Post Doctoral
PPP4951	Standard Union Deduction Report

## 2 Product/Solution Scope

### 2.1 Included in Scope

- PPP4951 Standard Union Deduction Report
- Tab-Delimited File (established in R1966)
- Compute
- ORCA
- Rush Checks

### 2.2 Excluded from Scope

- No changes to Union Roster

### 2.3 Assumptions & Constraints

ID	Assumption / Constraint
2.3.1	PPS should no longer do reporting and/or calculating as it pertains to Paid Directs (title code 3254). Dues and fees should not be calculated for 3254.

### 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>	Reporting	Title Code 3254-Postdoctoral Scholar Paid Direct Scholars should be removed from the Standard Union Deduction Report, PPP4951	H	
<b>R0002</b>	Compute, ORCA and Rush Checks	<p>The dues, agency fees and charity fees calculation routine developed for the PX unit should be modified to exclude 3254-PostDoc Paid Direct non-paying distributions.</p> <p>Currently, In the event a Postdoctoral Scholar is appointed to the Paid Direct title (3254) and the Employee title (3252), the dues/fees required as a result of combining the gross earnings from both pay sources are deducted entirely from the Employee (3252) supplement. Proposed process: PPS should only report, calculate and deduct based on the gross earnings of title code 3252.</p> <p>Currently, In the event a Postdoctoral Scholar is appointed to the Paid Direct title (3254) and the Fellow title (3253), the dues/fees required as a result of combining the gross earnings from both pay sources is</p>	H	See attached UPAY form.

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		deducted entirely from the Fellow's (3253) stipend. Proposed process: PPS should only report, calculate and deduct based on the gross earnings of title code 3253.		
<b>R0003</b>	Reporting	Currently, the 3254 'earnings' is included in the dues/fees calculation in the payroll compute, and if any part of the deduction can't be taken, it's recorded as a not-taken amount. Going forward, the 3254 'earnings' will not be included in the compute calculation. As such, "Not Taken" amounts for 3254 earnings (the difference of the Total Deduction Amount and the Remit Amount) will no longer exist and all references to them should be removed from existing reports and tab-delimited files.	H	3254 earnings should be removed from the calculation. As such, 3254 not taken amounts will no longer exist.
<b>R0004</b>	Reporting	Paid Directs (Title Code 3254) should remain on the union roster files.	H	

## 6 Non-Functional Requirements

N/A

## 7 External References

N/A



## 8 Examples:

### Example 1:

- \$200.00 in title 3252 earnings
- \$3800.00 in title 3254 'earnings'
- Calculate the deduction on the \$200.00 earnings only, and report only the 3252 earnings on the deduction report.

### Example 2:

- Employee with only 3254 'earnings' of \$4000.00
- Do not calculate any deduction at all
- Do not attempt to take any deduction
- Employee should not appear on the deduction report

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PAYROLL/PERSONNEL  
DESCRIPTION OF SERVICE TABLE  
UPAY650 (R11/09) R1889

PREPARED BY: **JAIMIE ESPINOZA** DATE: **4/30/14**  
 AUTHORIZED BY: **[Signature]** DATE: **4/30/14**

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RETN: ACCOUNTING:  
UNTIL ACTION TAKEN