Business Requirements Document

SR100785 – 2014 PX Fair Share & CO Update
Document Information

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<tr>
<td>ID</td>
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<tr>
<td>Owner</td>
<td>Payroll Coordination</td>
</tr>
<tr>
<td>Author(s)</td>
<td>Jaime Espinoza</td>
</tr>
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<td>Contributor(s)</td>
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Revision History

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<th>Version</th>
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<td>1.1</td>
<td>8/19/14</td>
<td>Added UPAY and Protrack</td>
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Document Approvals

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<th>Name</th>
<th>Signature</th>
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<tbody>
<tr>
<td>Associate Vice President &amp; Systemwide Controller</td>
<td>Peggy Arrivas</td>
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1 Overview

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

1.1 Background

The UAW Local 5810 noticed the University to Increase the Fair Share Fee payroll deduction amount from 0.80% to 0.84% 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 0.80% to 0.84% for the covered PX Unit.

1.3 Related Projects & Dependencies

Updates must be fully implemented to effect August 2014 earnings paid August 29, 2014.

1.4 Stakeholders

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Description</th>
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<td>Accountable for accuracy of this document (e.g. project manager)</td>
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<td>Provides supporting services in the production of this document</td>
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### 1.5 Proposed Strategy

Effective with August 2014 earnings, Paid August 29, 2014, agency fees and related charitable deductions are to be based on a rate of 0.84%. The following GTNs will be updated as per the attached UPAY712 forms.

**GTN Number: Description**
- 475 (PX AGNCY FEE)
- 524 AMER CNCR SO
- 525 HABITAT
- 526 (OXFAM)
- 527 (AMER CNCR SO - SAN DIEGO ONLY)
- 528 (HABITAT - SAN DIEGO ONLY)

### 1.6 Glossary

<table>
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<th>Term</th>
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<tr>
<td>PX</td>
<td>PostDoctoral Bargaining Unit</td>
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<tr>
<td>UAW</td>
<td>International Union, United Automobile, Aerospace &amp; Agricultural Implement Workers of America</td>
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<tr>
<td>CO</td>
<td>Conscientious Objectors</td>
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<tr>
<td>GTN</td>
<td>Gross To Net</td>
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### 2 Product/Solution Scope

#### 2.1 Included in Scope

Fair Share Fee payroll deduction

“Conscientious Objectors” (CO) charity deductions
2.2 Excluded from Scope

N/A

2.3 Assumptions & Constraints

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<th>Assumption / Constraint</th>
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2.4 Outstanding Items

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3 Business Services and Processes

N/A

4 Business Rules

N/A

5 Business Requirements

5.1 User Requirements
## 5.2 Functional Requirements

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<td>R0001</td>
<td>Control Table Updates</td>
<td>Update Benefits Rates Table per attached UPAY712</td>
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### 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)

### 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 0.0150000.
- 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

---

### PREPARED BY:

Jaime Esquivel

**DATE:** 8/14/14

### APPROVED BY:

**DATE:** 8/18/14

### 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)

---

#### 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 8s for the cap.

- Format 001 can be used when there is no Calculation Routine.

- **All campuses except San Francisco**

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### Table

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### Additional Information

**Prepared by:**

**Jaime Espinoza**  
**Date:** 8/4/14  
**Approved by:**  
**Date:** 8/14/14

**Retention:** Accounting: Until Action Taken
### BENEFITS RATES TABLE
**GROSS-TO-NET RATES/AMOUNTS**
**FORMAT 001 & 002 & 003**
**UPAY712 (R1206) R1744**
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**Prepared By:**
Jaime Esquivel

**Date:**
8/14/14

**Approved By:**

Jersey

**Date:**
8/14/14

**Retention:** Accounting: Until Action Taken
UC HR/BENEFITS - INFORMATION SYSTEMS SUPPORT
SERVICE REQUEST
UISAS 160 (R 7/94)

DATE  8/14/14
DATE/CYCLE DUE  8/21/14

PERSON AUTHORIZING REQUEST:  Peggy Arrivas
SYSTEMS CONTACT:  Elizabeth Burkart

DEPARTMENT:  Payroll Coordination
REQUESTOR:  Karren Yun

RECHARGE NO:  NR-Payroll
SYSTEMS/FILES/PROGRAMS:  Payroll

RETRIEVAL/SYSTEM MODIFICATION:  Description of Request
SR100785 2014 PX Fair Share & CO Update

PRODUCTION RUN

SYSTEM  EFFECTIVE DATE OF INFORMATION  TYPE OF RUN  TITLE OF OUTPUT

RETRIEVAL/PRODUCTION RUN

DISTRIBUTION OF OUTPUT INSTRUCTIONS (FOR RETRIEVAL REQUESTS, INCLUDE LONG TERM FILE RETENTION INSTRUCTIONS IF APPROPRIATE)

IS&S USE ONLY

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ESTIMATE INFORMATION

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APPROVAL TO PROCEED

BASED ON ESTIMATE

(SIGNATURE) 8/18/14

NAME, TITLE, PHONE NUMBER