Service Request 100641

DX Bargaining Unit initial implementation

Technical Specification

July 14, 2014
Prepared by Peter Parker
Information Resources & Communications
Office of the President
University of California
Version History

<table>
<thead>
<tr>
<th>Version #</th>
<th>Date</th>
<th>Revised By</th>
<th>Reason for Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>July 21, 2014</td>
<td>Peter Parker</td>
<td>Initial Draft</td>
</tr>
<tr>
<td>1.1</td>
<td>November 5, 2014</td>
<td>Peter Parker</td>
<td>Revise description of Phase I and II; revised code changes to PPP711 in section 4.4</td>
</tr>
<tr>
<td>1.2</td>
<td>December 12, 2014</td>
<td>Peter Parker</td>
<td>Revised “Phase II” in section 1.3 (Proposed Strategy)</td>
</tr>
</tbody>
</table>
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1 Introduction

In November 2013, The University of California came to an agreement with the Union of American Physicians and Dentists (UAPD) allowing the UAPD to represent physicians, dentists and podiatrists at campus-based student health and counseling centers. The new unit will be associated with Collective Bargaining Unit Code ‘DX’ “Student Health Physicians & Dentists.” This new value needs to be established in the Payroll/Personnel System (PPS) and PPS modifications will be required to support this new unit.

1.1 Objectives
Modify the PPS in order to support a new Collective Bargaining Unit, Student Health Physicians & Dentists – DX.

1.2 Related Projects & Dependencies
There are PIN impacts when a new bargaining unit is added. PIN tables and coding will be impacted. A PIN BRD will be prepared, SR100729 – PIN Changes In Support Of DX Bargaining Unit.

1.3 Proposed Strategy
A phased approach that would allow the set-up work to be done in advance, ahead of ratification, as follows.

- Phase I (release prior to ratification):
  1. Set up new titles in TCS (done by HR) with bargaining unit 99. (This step has already been completed.)
  2. Produce transactions in TCS and process in PPS to populate the TCT. (This step has already been done.)
  3. Move employees into the new titles with the 99 bargaining unit. (Locations have been instructed to complete this step, making the change effective July 1, 2014.)
  4. Phase I release:
     - TCS should be updated to change the new title codes from 99 to DX.
     - TCS transactions should be produced and applied to the TCT.
     - Set up other PPS control tables to establish the new DX bargaining unit.
     - Omit transactions needed to establish GTNs for dues and set flag in BUT indicating that DX is not exclusively represented.
     - Due and fees will not be collected since DX is not exclusively represented and no GTNs have been established for them.
     - DX employees will not be listed on PPP770 report (union reporting file) because DX is not exclusively represented.
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- **Phase II (following ratification, PPS release of program changes, and PIN implementation)**:

  Option 1:
  - Prior to Monthly Maintenance, update the BUT to make the union the exclusive representative, and add the GTNs to the GTN and BRG/BUG (as needed)
  - Run Monthly Maintenance – all employees will be automatically enrolled in agency fees
  - Prior to the compute, enroll employees manually in union dues or conscientious objector fees as usual

  Option 2:
  - After Monthly maintenance, update the BUT and GTN and BRG/BUG as above
  - Prior to the compute, run PPP762 to enroll all employees in agency fees
  - Prior to the compute, enroll employees manually in union dues or conscientious objector fees as usual

### 2 Requirements Matrix

<table>
<thead>
<tr>
<th>Req ID</th>
<th>Requirement Type</th>
<th>Requirement Description</th>
<th>Priority [L/M/H]</th>
<th>Comments</th>
</tr>
</thead>
</table>
| R0001  | Control Table Updates  | Update the Benefits Rates Table (BRT)                                                  | H                | UPAY712
  The BRG table should be updated with dues and fees.

  BRT updates: cap, etc. There is no cap here, cap should be all 9’s. |
| R0002  | Control Table Updates  | Bargaining Unit Table updates are needed to:                                           | H                | BUT – to define the unit
  UPAY565A
  This is needed prior to the TCT updates that put the new title codes into |

---

1 QA should follow the same steps to be used in the production environment to ensure the results are predictable.
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<table>
<thead>
<tr>
<th>R0003</th>
<th>Control Table Updates</th>
<th>Bargaining Unit Table updates are needed to:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>• establish agency fee, i.e., processing charge entries. (BUF table)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• associate dues and charity GTN numbers with the unit code (BUG table)</td>
</tr>
</tbody>
</table>

**Dues should not be triggered before the contract is ratified.**

<table>
<thead>
<tr>
<th>R0004</th>
<th>Control Table Updates</th>
<th>Code Translation Table</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>New values and translations for these bargaining unit data elements:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• EDB0161 – Collective Bargaining Unit Code (24 characters) (Employee level)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• EDB0255 – Employee Unit Code (23 characters) (Employee Level)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• EDB0445 - Employee Benefit Eligibility Unit Code-EDB (23 characters) (Employee Level)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• EDB2029 - Title Unit Code (TUC)-EDB (24 characters) (Appointment)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th></th>
<th>H</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>When the title code is updated, this appears to re-derive The Title Unit Code (EDB2029), viewed on IAPP, immediately.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The Collective Bargaining Unit Code (EDB0161) and the Employee Unit Code (EDB0255), viewed on the IGEN screen, also seem to be derived immediately.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>However, the Benefit Eligibility</td>
</tr>
</tbody>
</table>

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**BUF** – For some units there is only a rep code C (covered) entry, and for some there is both a code C and a code U (uncovered) entry. This new DX bargaining unit will only have “C.”

**UPAY565E**

**BUG** – GTN entries will be coded for the C representation code. UPAY565A type G entries.
The new code should be “DX” and the translation is “Student Health Physicians and Dentists.”

Unit Code on the ECEN screen (EDB0445) is not immediately re-derived. It is derived during the monthly file maintenance process.

R0005  | Control Table Updates  | Code Translation Table  | H  
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>New value(s) of the Employee Relations Code EDB0160 is “J”</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>CTT entry length 12 is: Excluded</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>CTT entry length 21 is: Excluded from coverage</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>This employee relations code will exclude the individual from any and all representation. Employees with this new employee relations code should not appear in the Union Roster file.</td>
<td></td>
</tr>
</tbody>
</table>

R0006  | Employee Relations Code  | PPS modifications to trigger a rep code of “U” (uncovered) when the employee relations code is “   “ (the new value). When the employee relations code is changed to the new value “ J” the bargaining unit code is expected to remain DX.  |  |

R0007  | Control Table Updates  | GTN Table updates are needed to establish union dues, agency fee, and charity deduction  | H  
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>UPAY 545. Liability FAUs may require site-</td>
<td></td>
</tr>
</tbody>
</table>
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<table>
<thead>
<tr>
<th>R0008</th>
<th>Control Table Updates</th>
<th>Title Code Table</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Transactions from TCS should be processed in PPS in order to add these new title codes to the Title code table. (TCT)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>R0009</th>
<th>Data Element Table</th>
<th>TX should be made a valid value for the following data elements</th>
</tr>
</thead>
</table>
|       | • 0161, Employee Relations Unit  
• 0255, Employee Unit Code  
• 0445, Benefits Eligibility Unit Code  
• 0761, Pending Premium Employee Benefit Eligibility Unit Code | |

There will be a new valid value for Employee Relations Code EDB0160.

<table>
<thead>
<tr>
<th>R010</th>
<th>Data Dictionary</th>
<th>PPS Data Dictionary needs to be updated for:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>• EDB0161 - Collective Bargaining Unit Code</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>R0011</td>
<td>CICS Help</td>
<td>DX needs to be reflected on the CICS help screens for EDB0161, EDB0255, EDB0445, EDB2029. Help updates are needed for EDB0160, Employee Relations Code.</td>
</tr>
<tr>
<td>R00012</td>
<td>PPS Web</td>
<td>Employee Unit Code Help file may need to be updated in PPS change applications on the PPS web applications (new hire, rehire, change). The new DX value should be enterable and viewable on the PPSWeb screens.</td>
</tr>
<tr>
<td>R00013</td>
<td>Web Merit</td>
<td>There is a need to be able to select DX for Collective Bargaining Code when setting up a new cycle in the cycle administration page.</td>
</tr>
<tr>
<td>R00014</td>
<td>Testing</td>
<td>Changes should be tested with multiple pay cycles types (BW and MO) Testing should ensure that dues will not be triggered before the contract is ratified.</td>
</tr>
<tr>
<td>R00015</td>
<td>Deductions</td>
<td>All union deductions should be based on only in-unit earnings.</td>
</tr>
</tbody>
</table>
3 Table update

3.1 Listing of Table Update transactions

<table>
<thead>
<tr>
<th>PROJ ECT:</th>
<th>MEMBER:</th>
<th>DATE:</th>
<th>TIME:</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAYT</td>
<td>BRTPROD</td>
<td>14/07/17</td>
<td>10:38</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>GROUP:</th>
<th>LEVEL:</th>
<th>TYPE:</th>
</tr>
</thead>
<tbody>
<tr>
<td>SR100641</td>
<td>01.06</td>
<td>CARDLIB</td>
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</table>

<table>
<thead>
<tr>
<th>USERI D:</th>
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</thead>
<tbody>
<tr>
<td>PAYKXS</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PAGE:</th>
</tr>
</thead>
<tbody>
<tr>
<td>01 OF 01</td>
</tr>
</tbody>
</table>

START

COL

--- + --- + --- + --- + --- + --- + --- + ---

1 14002637000009000999999999 DXC
1 14002638000008600999999999 DXC
1 14002639000008600999999999 DXC
1 14002640000008600999999999 DXC
1 14002641000008600999999999 DXC

<table>
<thead>
<tr>
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<th>TIME:</th>
</tr>
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<tbody>
<tr>
<td>PAYT</td>
<td>BUTPROD</td>
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<td>10:38</td>
</tr>
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</table>

<table>
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<tr>
<th>GROUP:</th>
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<th>TYPE:</th>
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<tbody>
<tr>
<td>SR100641</td>
<td>01.02</td>
<td>CARDLIB</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>USERI D:</th>
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<tr>
<td>PAYKXS</td>
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<thead>
<tr>
<th>PAGE:</th>
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</thead>
<tbody>
<tr>
<td>01 OF 01</td>
</tr>
</tbody>
</table>

START

COL

--- + --- + --- + --- + --- + --- + --- + ---

1 17DXU1 STUDENT HEALTH DOCTORS
1 17DXU2 UAPD UNION OF PHYSICIANS AND DENTISTS
1 17DXU3 OAKLAND HEADQUARTERS
1 17DXU4 SUITE 1380
1 17DXU5
1 17DXGC 637 638 639 640 641
1 17DXFC 6376380000000100639640641 VA

<table>
<thead>
<tr>
<th>PROJ ECT:</th>
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<th>DATE:</th>
<th>TIME:</th>
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<tbody>
<tr>
<td>PAYT</td>
<td>CTTPROD</td>
<td>14/07/17</td>
<td>10:38</td>
</tr>
</tbody>
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<table>
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<tr>
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<tr>
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<tbody>
<tr>
<td>01 OF 01</td>
</tr>
</tbody>
</table>

START

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1 38 CTLGTNLBL 63724UAPD DUES - DX UNIT
1 38 CTLGTNLBL 63824UAPD AGENCY FEES - DX UNIT
1 38 CTLGTNLBL 63924UAPD NAACP LEGAL DEFENSE & EDUCATIONAL FUND - DX UNIT
1 38 CTLGTNLBL 64024UAPD HABITAT FOR HUMANITY - DX UNIT
1 38 CTLGTNLBL 64124UAPD ORFAM AMERICA - DX UNIT
1 38 EDB0160 21EXCLUDED FRM COVERAGE
1 38 EDB0160 21EXCLUDED FRM COVERAGE
1 38 EDB0161 DX 24UAPD PHYSICIANS AND DENTISTS
1 38 EDB0255 DX 23UAPD PHYSICIANS AND DENTISTS
1 38 EDB0445 DX 23UAPD PHYSICIANS AND DENTISTS

<table>
<thead>
<tr>
<th>PROJ ECT:</th>
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<th>DATE:</th>
<th>TIME:</th>
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<tbody>
<tr>
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<tbody>
<tr>
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<table>
<thead>
<tr>
<th>PAGE:</th>
</tr>
</thead>
<tbody>
<tr>
<td>01 OF 01</td>
</tr>
</tbody>
</table>
4 Overview of System Modifications

4.1 Changes to PPCB01

PPCB01 derives several fields related to collective bargaining and sets flags to trigger derivations by other processes.

This change causes employees with an employee relations code changed to “J” to be uncovered. This provides the ability to “exclude” an employee from all collective bargaining.

```
<p>| | | | | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>A0230706371DX UNION DUE DU ABAY FRT 15C $V0000100 201</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>A0230706372 115127                                   2       1    YY 201</td>
<td></td>
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<td></td>
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<td>A0230806381IDX AGNCY FEE DM ABAY FRT 15C $V0000100 201</td>
<td></td>
<td></td>
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<td></td>
<td></td>
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<tr>
<td>1</td>
<td>A0230806382 115043                                   2       3   3YY 201</td>
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<td></td>
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<tr>
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<td>A0230906391DX NAACP LDF DM ABAY FRT 15C $V0000100 201</td>
<td></td>
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<td>1</td>
<td>A0230906392 115105                                   2       3   CYY 201</td>
<td></td>
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</tr>
<tr>
<td>1</td>
<td>A0240006401DX HAB 4 HUM DM ABAY FRT 15C $V0000100 201</td>
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<tr>
<td>1</td>
<td>A0240006402 115105                                   2       3   CYY 201</td>
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</tr>
<tr>
<td>1</td>
<td>A0240106411DX OXFAM       DM ABAY        FRT 15C   SV0000100          201</td>
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<tr>
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<td>A0240106412 115105                                   2       3   CYY 201</td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>
```
4.2 Changes to PPEI505

PPEI505 performs consistency edits and maintenance for BRSC (Benefits Rates Selection Code) data.

This change expands the values of employee representation code that will not be subject to union dues to include “J”. 
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**********************************************************************************
* PROGRAM PPEI 505 *
* RELEASE: 1772 SERV CE REQUEST(S): 15125 */ 51251772 *
* NAME: R. GLASER MODI FI CATI ON DATE: 06/12/07 */ 51251772 *
* DESCRIPT ON: */ 51251772 *
* MDCI FI ED TO ADD NEW DX UNI ON */ 06412150 *
**********************************************************************************

** 00205 MATCHING LINES NOT DISPLAYED **

05 E0278 PI C 9(04) VALUE 'Y'. PPEI 505
05 E6000 PI C 9(04) VALUE 0278. PPEI 505
05 E7000 PI C 9(04) VALUE 6000. PPEI 505

01 M SC- WORK- AREAS.
05 FI RST- TI ME- SW PI C X(01) VALUE 'Y'. PPEI 505

88 THI S IS THE FI RST- TI ME VALUE LOW VALUES. PPEI 505
88 NOT- THE- FI RST- TI ME VALUE 'Y'. PPEI 505
05 VI E- EMP- REL- CODE PI C X(01). 28141050
88 NOT- ELI GI BLE- FOR- UDUES VALUES 28141050

****

88 ELI GI BLE- FOR- UDUES VALUES 28141050
05 UDUE- MESSA GE- SW PI C X(01) VALUE LOW VALUES. 28141050
88 NOT- UDUE- MESSA GE VALUE LOW VALUES. 28141050
88 UDUE- MESSA GE VALUE 'Y'. 28141050
05 UDUES- TI PE- SW PI C X(01) VALUE LOW VALUES. 04151489
88 NOT- DUES- TI PE VALUE LOW VALUES. 04151489
88 DUES- TI PE VALUE 'Y'. 04151489
05 FI LLE PI C X(01) VALUE SPACE. 28141050
88 GN- ROW OPEN VALUE 'Y'. 28141050

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4.3 Changes to PPP400

PPP400 performs Gross-to-Net processing within the compute and creates a PAR file from the EDB and the preliminary PAR file with gross-to-net activity.

This change activates processing that pays union dues only on in unit earnings.

```
* PROGRAM PPP400  */ 06412150
* RELEASE:  2150 SERVE CE REQUEST(S):  100641  */ 06412150
* NAME:  K STEVENS  MODD FI CATI ON DATE:  07/08/14  */ 06412150
* DESCRIPTI ON: */ 06412150
- Modified to add new DX union. */ 06412150
* - Recompile due to PPPV400A changes. */ 06412150
---------------------------------------------------------------------------

** 04554 MATCHING LINES NOT DISPLA YED **

```

```

** 04554 MATCHING LINES NOT DISPLA YED **

```

```

```

* PROGRAM PPP400  */ 02312089
* RELEASE:  2089 SERVE CE REQUEST(S):  100231  */ 02312089
* NAME:  nx0  MODD FI CATI ON DATE:  12/18/13  */ 02312089
* DESCRIPTI ON: */ 02312089
- Recompila te due to PPPV400A changes. */ 02312089
---------------------------------------------------------------------------

```

```

```

* PROGRAM PPP400  */ 06412150
* RELEASE:  2075 SERVE CE REQUEST(S):  83636  */ 06412150
* NAME:  MARY MEYER  MODD FI CATI ON DATE:  11/20/12  */ 06412150
* DESCRIPTI ON: */ 06412150
---------------------------------------------------------------------------

```

```

** 04554 MATCHING LINES NOT DISPLA YED **

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** 04554 MATCHING LINES NOT DISPLA YED **

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** 04554 MATCHING LINES NOT DISPLA YED **

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** 04554 MATCHING LINES NOT DISPLA YED **

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* PROGRAM PPP400  */ 06412150
* RELEASE:  2150 SERVE CE REQUEST(S):  100641  */ 06412150
* NAME:  K STEVENS  MODD FI CATI ON DATE:  07/08/14  */ 06412150
* DESCRIPTI ON: */ 06412150
- Recompile due to PPPV400A changes. */ 06412150
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4.4 Changes to PPP711

PPP711 creates the employee file for the corporate personnel system (FCP) and the corporate benefits counseling system (BCS).

These changes establish a new code value for one of the elements in the CPS interface file created by PPP711.

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**02394 MATCHING LINES NOT DISPLAYED **

1  IF EMP-REL-CODE = 'A' OR 'B'
   MOVE '1' TO XECP-C926-POSI ON-TYPE-CODE
2  ELSE
   IF EMP-REL-CODE = 'C' OR 'D'
      MOVE '2' TO XECP-C926-POSI ON-TYPE-CODE
   ELSE
      IF EMP-REL-CODE = 'G'
         MOVE '4' TO XECP-C926-POSI ON-TYPE-CODE
      ELSE
         MOVE '3' TO XECP-C926-POSI ON-TYPE-CODE
      END-IF
4.5 Changes to PPRCNET

PPRCNET calculates deductions for online Rush Check processing.

This change activates processing that pays union dues only on in unit earnings.

```cobol
SR100641 - DX Bargaining Unit initial implementation
Technical Specification

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SR100641 - DX Bargaining Unit initial implementation
Technical Specification

AND WK-BUF-UNIT-TUC NOT = 'PX' 31111965

----+----1----+----2----+----3----+----4----+----5----+----6----+----7----+----8

AND WK-BUF-UNIT-TUC NOT = 'DX' 06412150

1----+----2----+----3----+----4----+----5----+----6----+----7----+----8

* ---- > Some unions ("BX") only accept unit pay based deductions 02601438

PERFORM 72721309

VARYING ACCT-X FROM 1 BY 1 72721309

UNTIL ACCT-X > RCPW-ACTX 72721309

OR RCPW-TITLE-UNIT-CODE (ACCT-X) 72721309

= WK-BUF-UNIT-TUC 72721309

END-PERFORM 72721309

IF ACCT-X > RCPW-ACTX 72721309

MOVE WK-BUF-UNIT-TUC TO WS-SEARCH-TUC 72721309

PERFORM 9750-EXAM-NE-APPT-TUC 72721309
5 Unit Testing Requirements

When running PPP495 “DX” must be added to the specification card (e.g. PPP495-SPECCXEXSXHXRXTXIXLXNXBXPXDX)

5.1 Set-Up

Load a test environment from Production. This includes EDB, CTL, IID, PAR.

Remove all programs from test region.

5.2 Methodology

Two separate tests will be needed to ensure that the new DX union employees are being computed correctly. Employees will need to be both bi-weekly and monthly.

Before Test:
1. Set-up test cases by appointing employees to new DX title codes in on the EDB.
2. Add appointments tied to the new titles (ie title codes 6000 – 6011). These employees should show 99 for bargaining unit.
3. Backup Database
4. Run a before computes with jcl pointing all programs to base.
5. Keep PAR files computes
6. Run PAR update job
7. Run union dues (PPP495) and Union reporting (PPP770) ; don’t expect to have anyone in DX

After Test:
1. Install the changed programs into the test region.
2. Restore database
3. Apply all table updates provided.
4. Change bargaining unit to DX by running PPP290: See PAYT.SR100641.JCL(RUN290QA). Run transactions output in EDB maintenance run that will apply the transactions.

5. Do EGTN to tie test employees to union dues (637), charity 1-3(639-641); should default to agency fee (638)

6. Run EDB maintenance process-PPP120 – employees in test cases should be DX/Cov in IAPP

7. Run an after computes with jcl pointing to changed programs in environment

Compare before and after PAR files; should be identical with the exception of the test cases who should have DX deductions.

5.3 Test-Cases

- Employees who are:
  - Bi-Weekly and Monthly
  - Have regular appointments
  - One for each new DX.