

Business Requirements Document

SR101021 – 2015-2016 CalPERS 1959 Survivor Rate Adjustment

Information Technology Services

Office of the President

Document Information

Document Attributes	Information
ID	101021
Owner	Payroll Coordination and Tax Services
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Revision History

Version	Issue Date	Changes
1.0	06/12/2015	
1.1	06/15/2015	Faye Isaacson added signed Protract and UPAY
1.2	06/16/2015	Faye Isaacson replaced the UPAY with revised copy

Document Approvals

Role	Name	Signature	Date
Controller	Peggy Arrivas		

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1 Overview

Modify PPS to update the CalPERS 1959 Survivor Rate for the 2015-2016 fiscal year.

1.1 Background

The California Public Employees Retirement System (CalPERS) 1959 Survivor Benefit Rate is changing as of July 1, 2015. CalPERS announced the new rate on June 10, 2015 in [Circular Letter # 200-028-15](#). These rates usually adjust on an annual basis. This adjustment is for eligible survivors of participating CalPERS members who die while actively employed and covered by CalPERS.

1.2 Objectives

- Current Process – The rate in PPS is currently 5.55
- Proposed Process – The Gross – to - Net Table must be updated with the new rate of 5.20

Deadline – The change takes effect for the first payroll period that ends in July 2015. Campuses should update the tables after processing June earnings.

1.3 Related Projects & Dependencies

N/A

1.4 Stakeholders

Acronym	Description	Role
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*	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
John Barrett	Manager			X	X	X	X
Jaime Espinoza	Principal Analyst					X	
Peggy Arrivas	Controller	X					

1.5 Proposed Strategy

N/A

1.6 Glossary

N/A

2 Product/Solution Scope

2.1 Included in Scope

Eligible survivors of participating CalPERS members who die while actively employed.

2.2 Excluded from Scope

Survivors of employees not covered under the CalPERS retirement plan.

2.3 Assumptions & Constraints

N/A

2.4 Outstanding Items

N/A

3 Business Services and Processes

N/A

4 Business Rules

N/A

5 Business Requirements

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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	Gross - to- Net Table Update per attached UPAY	H	

5.3 Reporting Requirements


N/A

6 Non-Functional Requirements

N/A

7 External References

N/A



**PAYROLL PERSONNEL
GROSS-TO-NET TABLE**
UNIVERSITY OF MARYLAND

MEMORANDUM FOR: *John A. ...*

DATE: 06/15/2015

PERSONNEL INFORMATION		EMPLOYMENT INFORMATION		PAYROLL INFORMATION		GROSS TO NET INFORMATION	
UNIT	POSITION	CLASS	GRADE	MONTH	DAYS	GROSS	NET
02	026	1	PERS SURV	06	15	520	
02		2					
02		3					

BENEFIT CODES		EMPLOYMENT CODES		PAYROLL CODES		GROSS TO NET CODES	
UNIT	POSITION	CLASS	GRADE	MONTH	DAYS	GROSS	NET
02	026	1	PERS SURV	06	15	520	
02		2					
02		3					

MEMORANDUM FOR: *John A. ...*

DATE: 06/15/2015

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UC HR/BENEFITS - INFORMATION SYSTEMS SUPPORT

SERVICE REQUEST
UISAS 160 (R 7/94)

DATE 6/12/15	DATE/CLOCK TIME 7/1/15
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PERSON AUTHORIZING REQUEST Peggy Arrivas	SYSTEMS CONTACT Elizabeth Burkart
DEPARTMENT Payroll Coordination & Tax Services	RECHARGE NO. NR-Payroll
REQUESTOR John Barrett	SYSTEMS/FILLS/PROGRAMS Payroll

RETRIEVAL/SYSTEM MODIFICATION- Description of Action SR101021 -2015/2016 CalPERS 1959 Survivor Rate Adjustment

PRODUCTION RUN			
SYSTEM	DESCRIPTION OF INFORMATION	TYPE OF RUN	START/END TIME

RETRIEVAL/PRODUCTION RUN
NUMBER OF OTHER INSTRUCTIONS TO BE RUN: _____, INCLUDE ALL LEAD-IN INSTRUCTIONS INSTRUCTIONS IF APPROPRIATE.

UISAS USE ONLY									
DATE RECEIVED	REVISED DUE DATE	DATE COMPLETED	COMPLETED BY	COMPUTER TIME CHARGES	STAFF TIME CHARGES				
COMMENTS									
ESTIMATE INFORMATION		COMPLETION DATE	STAFF HOURS	COMPUTING COSTS	TOTAL COSTS				
			\$	\$	\$				

APPROVAL TO PROCEED DATE: 6/15/15	<i>JRB</i>	<i>Peggy Arrivas</i> SIGNATURE	<i>Peggy Arrivas, Avic Systems Controller</i> NAME/TITLE, UNIT, etc.
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