Business Requirements Document

SR101021 – 2015-2016 CalPERS 1959 Survivor Rate Adjustment
## Document Information

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<tr>
<td>ID</td>
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</tr>
<tr>
<td>Owner</td>
<td>Payroll Coordination and Tax Services</td>
</tr>
<tr>
<td>Author(s)</td>
<td>John Barrett</td>
</tr>
<tr>
<td>Contributor(s)</td>
<td>Jaime Espinoza</td>
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## Revision History

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<th>Version</th>
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<td>1.0</td>
<td>06/12/2015</td>
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<tr>
<td>1.1</td>
<td>06/15/2015</td>
<td>Faye Isaacson added signed Protract and UPAY</td>
</tr>
<tr>
<td>1.2</td>
<td>06/16/2015</td>
<td>Faye Isaacson replaced the UPAY with revised copy</td>
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## Document Approvals

<table>
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<tr>
<th>Role</th>
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<tbody>
<tr>
<td>Controller</td>
<td>Peggy Arrivas</td>
<td></td>
<td></td>
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<tr>
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<td>Section</td>
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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

<table>
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<tr>
<th>Acronym</th>
<th>Description</th>
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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
5.1 User Requirements

N/A

5.2 Functional Requirements

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<th>Requirement Description</th>
<th>Priority [L/M/H]</th>
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<tr>
<td>R0001</td>
<td>Control Table Updates</td>
<td>Gross - to- Net Table Update per attached UPAY</td>
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5.3 Reporting Requirements

N/A

6 Non-Functional Requirements

N/A

7 External References

N/A
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<td>04/05/2015</td>
<td>PERS-C RV</td>
<td>1</td>
<td>Personnel Service - RV</td>
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<tr>
<td>05/10/2015</td>
<td>Carton</td>
<td>2</td>
<td>Office Supplies</td>
</tr>
<tr>
<td>06/15/2015</td>
<td>Box</td>
<td>3</td>
<td>Furniture Packaging</td>
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**Remarks:**
- Personnel Service - RV: New personnel transfer.
- Office Supplies: Stationery and IT accessories.
- Furniture Packaging: For the move to new office.
UC HR/BENEFITS - INFORMATION SYSTEMS SUPPORT

SERVICE REQUEST
LJAS 160 (R 7/94)

PERSON: A. Tyndall-G. Squeezo
Peggy Arrives

DEPARTMENT: Payroll Coordination & Tax Services

REQUESTOR:
John Barrett

SYSTEMS CONTACT:
Elizabeth Burkart

REQUEST NO:
NR-Payroll

SYSTEMS ACTIONS:
Payroll

RETRIEVAL/SYSTEM MODIFICATION: Decisions of Janet
SR101021-2015/2016 CalPERS 1958 Survivor Rate Adjustment

PRODUCTION RUN

DATE

PROJECTOR

TYPE OF

RUN

STAFF

EXPIRED DATE

IN ORGAN

REQUEST

ISSS USER ONLY

DATE RECEIVED

RE-REQUEST

COMPILATION OF CHANGES

PRORATED

PRODUCTION CONTROL

COMMENTS

ISSUES INFORMATION

COMPUTER INVEST.

STAFF HOURS

COMPUTING COSTS

TOTAL COSTS

APPROVAL TO PROCEED

RES: Peggy Arrives

MARKET: Marcel