

# **Business Requirements Document**

**SR101055 – 2015 PX Fair Share & CO Update**

# Information Technology Services

Office of the President

## Document Information

Document Attributes	Information
ID	SR101055
Owner	Payroll Coordination
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Contributor(s)	

## Revision History

Version	Issue Date	Changes
1.0	7/17/15	Initial Draft
1.1	7/27/15	B. Burkart – added UPAY

## Document Approvals

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

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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 1.05% to 1.12% 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 1.05% to 1.12% for the covered PX Unit.

### 1.3 Related Projects & Dependencies

Updates must be fully implemented to effect August 2015 earnings paid September 1, 2015.

### 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

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Name	Position	*	R	A	S	C	I
Shaun Ruiz	Payroll Coordinator	X			X	X	X
Jaime Espinoza	Principal Analyst		X	X			X
Karren Yun	Labor Relations Manager					X	X
Elizabeth Burkart	Programmer Analyst - ITS				X		X

## 1.5 Proposed Strategy

Effective with August 2015 earnings, Paid September 1, 2015, agency fees and related charitable deductions are to be based on a rate of 1.12%. The following GTNs will be updated as per the attached UPAY712 forms.

### GTN Number: Description

- 475 (PX AGENCY FEE)
- 524 AMER CNCR SO
- 525 HABITAT
- 526 (OXFAM)
- 527 (AMER CNCR SO - SAN DIEGO ONLY)
- 528 (HABITAT - SAN DIEGO ONLY)

## 1.6 Glossary

Term	Description
PX	PostDoctoral Bargaining Unit
UAW	International Union, United Automobile, Aerospace & Agricultural Implement Workers of America
CO	Conscientious Objectors
GTN	Gross To Net

## 2 Product/Solution Scope

### 2.1 Included in Scope

*Benefits Rates Table updates for:*

- Fair Share Fee payroll deduction
- “Conscientious Objectors” (CO) charity deductions

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## 2.2 Excluded from Scope

## 2.3 Assumptions & Constraints

ID	Assumption / Constraint

## 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

### 5.2 Functional Requirements

Req ID	Requirement Type	Requirement Description	Priority [L/M/H]	Comments
<b>R001</b>	Control Table Updates	Benefits Rates Table updates per attached UPAY form	H	

## 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)

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ACCD	1	2	3	4	6	7	9	10	18
FORMAT	GTN NO	RATE / AMOUNT							
	14	001						*	
	14	001						*	
	14	001						*	
	14	001						*	

ACCD	1	2	3	4	6	7	9	10	18	19
FORMAT	GTN NO	RATE / AMOUNT								CAP
C	14	002			00001	1200			99999	9999
C	14	002			00001	1200			99999	9999
C	14	002			00001	1200			99999	9999
C	14	002			00001	1200			99999	9999

ACCD	1	2	3	4	6	7	9	10	18	19	27	28	36	37	45	46	54
FORMAT	GTN NO	RATE / AMOUNT								CAP	DEDUCTION PERCENT	REDUCED DEDUCTION AMOUNT	THRESHOLD PERCENT				
	14	003						*		*		*		*		*	
	14	003						*		*		*		*		*	
	14	003						*		*		*		*		*	
	14	003						*		*		*		*		*	

BUC	R	S	D
E	H	U	
P	C	C	
61	62	63	64

BUC	R	S	D
E	H	U	
P	C	C	
61	62	63	64
00			
0X			
00			
0X			

BUC	R	S	D
E	H	U	
P	C	C	
61	62	63	64

- 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 9s for the cap. Format 001 can be used when there is no Calculation Routine.

\* EXCEPT SAN DIEGO  
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PREPARED BY: JAIME ESPINOZA DATE: 7/20/15 APPROVED BY: [Signature] DATE: 7/22/15

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)

243

**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.

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\* EXCEPT SAN DIEGO



ACID	2	3	4	6	7	9	10	18	RATE /AMOUNT
1									10,000*
									*
									*
									*

ACID	2	3	4	6	7	9	10	18	RATE /AMOUNT	CAP
1									10,000*	19,000*
C					525				00001*1200	99999*9999
C					525				00001*1200	99999*9999
C					526				00001*1200	99999*9999
C					526				00001*1200	99999*9999

ACID	2	3	4	6	7	9	10	18	RATE /AMOUNT	CAP	DEDUCTION PERCENT	REDUCED DEDUCTION AMOUNT	THRESHOLD PERCENT
1									10,000*	19,000*	27.28	37.45	46.54
									*	*	*	*	*
									*	*	*	*	*
									*	*	*	*	*

BUC	R	S	D
E	H	U	
P	C	C	
61	62	63	64

BUC	R	S	D
E	H	U	
P	C	C	
61	62	63	64
00			
9X			
00			
9X			

BUC	R	S	D
E	H	U	
P	C	C	
61	62	63	64

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## 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)

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### 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 9s for the cap. Format 001 can be used when there is no Calculation Routine.

\* SAN DIEGO ONLY

ACID	1	2	3	4	6	7	9	10	RATE / AMOUNT
									1,18
		14	001						*
		14	001						*
		14	001						*
		14	001						*

ACID	1	2	3	4	6	7	9	10	RATE / AMOUNT	CAP
									1,18	19
C		14	002			527		00001	*1200	9999 * 9999
C		14	002			527		00001	*1200	9999 * 9999
C		14	002			528		00001	*1200	9999 * 9999
C		14	002			528		00001	*1200	9999 * 9999

ACID	1	2	3	4	6	7	9	10	RATE / AMOUNT	CAP	DEDUCTION PERCENT	REDUCED DEDUCTION AMOUNT	THRESHOLD PERCENT
									1,18	19	2,8	3,637	4,546
		14	003						*	*	*	*	*
		14	003						*	*	*	*	*
		14	003						*	*	*	*	*
		14	003						*	*	*	*	*

BUC	61	62	R	S	D

BUC	61	62	R	S	D

BUC	61	62	R	S	D

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RETENTION: ACCOUNTING: UNTIL ACTION TAKEN