

Business Requirements Document

SR101419 - 2016-2017 CalPERS 1959 Survivor Rate Adjustment

Information Technology Services

Office of the President

Document Information

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Owner	Payroll Coordination and Tax Services
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1.1	7/5/16	B. Burkart – added UPAY form

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 2016-2017 fiscal year.

1.1 Background

The California Public Employees Retirement System (CalPERS) 1959 Survivor Benefit Rate is changing as of July 1, 2016. CalPERS announced the new rate on June 20, 2016 in [Circular Letter # 200-033-16](#). 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 5.20
- Proposed Process – The Gross – to - Net Table must be updated with the new rate of 5.15
- Deadline – The change takes effect for the first payroll period that ends in July 2016. Campuses should update the tables after processing June earnings.

	Pay Begin	Pay End	Pay Date
BW	June 19, 2016	July 2, 2016	July 13, 2016
MO	July 1, 2016	July 31, 2016	August 1, 2016

1.3 Related Projects & Dependencies

N/A

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

Name	Position	*	R	A	S	C	I
Marcia Johnson	Tax Analyst 3		X				X
John Barrett	Tax Manager			X		X	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

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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

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

