

Business Requirements Document

SR101829 - 2017-2018 CalPERS 1959 Survivor Rate Change

Information Technology Services

Office of the President

Document Information

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ID	SR101829
Owner	Payroll Coordination and Tax Services
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Revision History

Version	Issue Date	Changes
1st draft	06/19/17	
1.1	6/20/17	B. Burkart – added UPAY

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 2017-2018 fiscal year.

1.1 Background

The California Public Employees Retirement System (CalPERS) 1959 Survivor Benefit Rate is changing as of July 1, 2017. CalPERS announced the new rate on June 15, 2017 in [Circular Letter # 200-037-17](#). 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 5.15
- Proposed Process – The Gross – to - Net Table (GTN 026) must be updated with the new rate of 5.20
- Deadline – The change takes effect for the first payroll period that ends in July 2017. Campuses should update the tables after processing June earnings.

	Pay Begin	Pay End	Pay Date
BW	June 18, 2017	July 1, 2017	July 12, 2017
MO	July 1, 2017	July 31, 2017	August 1, 2017

1.3 Related Projects & Dependencies

N/A

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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

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.

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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

