

## APPENDIX "F"

### CODING INSTRUCTIONS FOR SPECIAL SITUATIONS

#### A. Agreement on package increase, but not the components

Particularly in construction, the parties may agree upon a multi-year package containing immediate specified wage and benefit increases, but only the total of each deferred adjustment, with the allocation among wages and benefits to be decided at the time the adjustment is to become effective.

In these instances, at the time the settlement is coded, all of the deferred adjustments are to be treated as wage increases. (As previously described such increases are to be coded "12" in columns 56-57 of cards DA-DZ.) When the allocation among wages and benefits is determined, the entries are to be corrected to reflect the proper allocation.

#### B. Deductions from union scales for benefits

Again, particularly in construction, deductions are sometimes made from union scales for payments into benefit funds. Consequently, there may be questions whether the benefits are employer - or employee- financed.

In such cases, where, for example, the parties agree to a 50-cent wage increase with 5 cents to be deducted for vacation improvements, the total increase is to be considered a wage increase (with no benefit changes) if all 50 cents are to be added to wage rates for overtime calculations. (In effect, here the employee is financing the benefit improvement.) If, however, only 45 cents are added to wage rates for overtime calculations, then code for a 45-cent wage increase and a vacation improvement.

#### C. Open-end agreements

Agreements such as those commonly found in the railroad industry should be treated as running from the effective to expiration dates of their wage provisions, regardless of the open-end nature of the basic documents.

Where an agreement is completely open ended, enter "888888" as the expiration date. (Whenever this entry is made, the computer will treat the agreement as if it were for 1 year.)

#### D. Deferred wage changes after a reopening date

In the unusual case where a settlement provides a deferred increase to become effective after a specified wage reopening date, at the time the settlement is coded, enter all scheduled changes in accordance with general instructions. At the time changes negotiated under the reopening provision are coded, enter all previously negotiated changes scheduled to become effective

after the reopening date. These changes should then be deleted from the previous settlement record.

E. Automatic contract extension

In cases where, because the parties fail to serve notice of a desire to bargain, a contract scheduled to expire on a given date is automatically extended for a period of time (e.g., a year), code as for a new settlement, with the old expiration date and the extension period being used to date the "new agreement." Coding will be for no wage or benefit change, code "03" in the nature of Action Field (cc 12-13) on BA card. Remember to advance the negotiation number of the settlement.

F. Wage changes occurring between expiration date of previous agreement and settlement of new one.

When a cost-of-living increase is paid prior to the settlement of the new agreement, extend the expiration date of the previous agreement so that the adjustment can be included in the effective series. After the new contract has been negotiated there are two possibilities:

- 1) If the new agreement is retroactive to a date including the date of the interim COLA, code as part of the new settlement. The expiration date on the old settlement is corrected and the interim adjustment removed;
- 2) If the new settlement is not retroactive, then the adjustment and expiration date remain unchanged.

The two alternatives indicated above also apply to any other type of interim wage changes.

G. Negotiated wage changes of more than \$9.999 over life of contract

This situation is most likely to occur where professional bargaining groups are involved. The system is not designed to handle more than \$9.999 in total negotiated wage changes. If the negotiated wage changes total more than \$9.999 reduce the base AHE to an amount that will yield a total just less than \$10.00 when the correct total percent increase is applied to it. The wage changes should then be coded in percent. When the increases are negotiated in cents compute the total percent increase first.

EXAMPLE:   AHE   \$45.00  
Wage increases:   \$5.00    1/1/74  
                  \$4.00    1/1/75  
                  \$2.00    1/1/76  
Total increase   \$11.00  
Total percent increase  $\$11.00/\$45.00 = 24.4\%$   
           $24.4\% \times \text{AHE} = \$9.999$   
          AHE = \$40.98, adjust to \$40.90 to insure total  
                  wage change is less than \$10.00.

H. IF form of wage change uncertain

If the contract provides for a wage change (e.g., 10/1/76 wages will rise from \$5.50 per hour to \$6.28 per hour) without making it clear as to whether a percent or cents change is intended, the analyst should attempt through alternate sources to determine the form. If no precise information becomes available, the analyst should use available knowledge of the industry or company to make a decision.

I. Unknown changes in benefits

When changes are made in benefits without details being known, the analyst may make use of the data base print and error messages as a reminder of the need for more information in the benefit groups. This is done by placing a proper code in BEOVERL (cc 28 on BA card) and leaving blanks everywhere else. Though an ampersand and error messages will be generated, the situation will not be fatal. The analyst should be cautioned that such a procedure is acceptable only in the benefit fields. Similar coding in the wage groups will fatalize the situation.

J. Deactivation or Correction of a Situation.

There are a number of reasons for which a change may need to be made in the coding cards--errors, new information, or changes in various wage factors. For non-fatal errors or other changes that the analyst may make, a "D+A" should be placed on the top right corner and the change should be clearly marked. For a fatal error, "FATAL" should be printed on the top left corner and the change made.

In any case, the change should be proofed on the resulting data base print and the coding card should be marked to indicate that the change has been made.

K. If there is any doubt about the handling of special situations, or in the application of any of the instructions, you should consult your supervisor to insure the maintenance of uniformity.