



## BOBJ REPORT DESCRIPTION

### B0064 Estimated Longevity Eligibility/Length of Service

#### Report Description:

This report provides a list of employees who have achieved at least 10 years of creditable service, and are eligible to receive a longevity payment within 12 months of the date the report is executed. The Office of State Human resources longevity policy states that full-time and part-time (20 hours or more) permanent, probationary, trainee and time-limited employees are eligible for longevity pay.

#### Report Location:

PA: Longevity & Retirement

#### Report uses:

This report can be used to determine the estimated longevity for eligible employees within an org unit for a 12-month period, rather than performing manual calculations. The amount of estimated longevity is calculated by multiplying the employee's salary by the longevity percentage rate based on the employee's length of service as of the date the report is executed. The percentage rate increases as the employee completes 10, 15, 20, and 25 years of service.

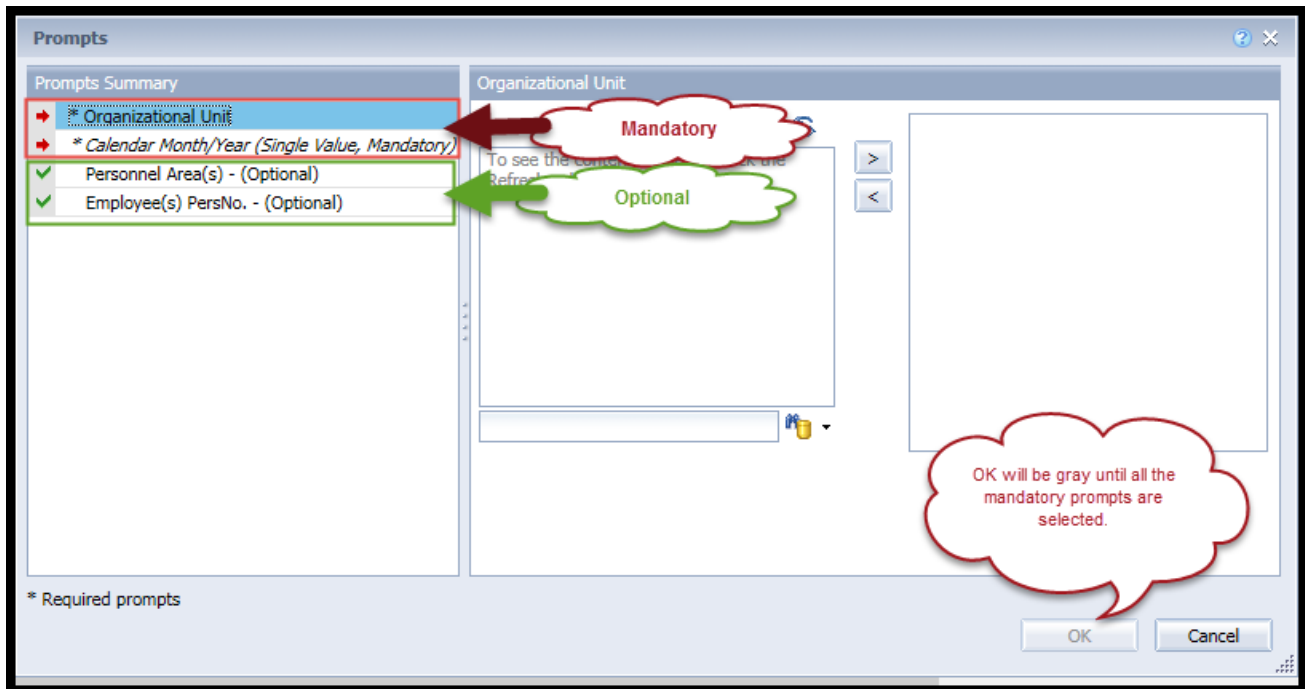
This report can be used for budgeting, to estimate and plan salary and longevity payments for a 12-month period for a specified org unit(s).

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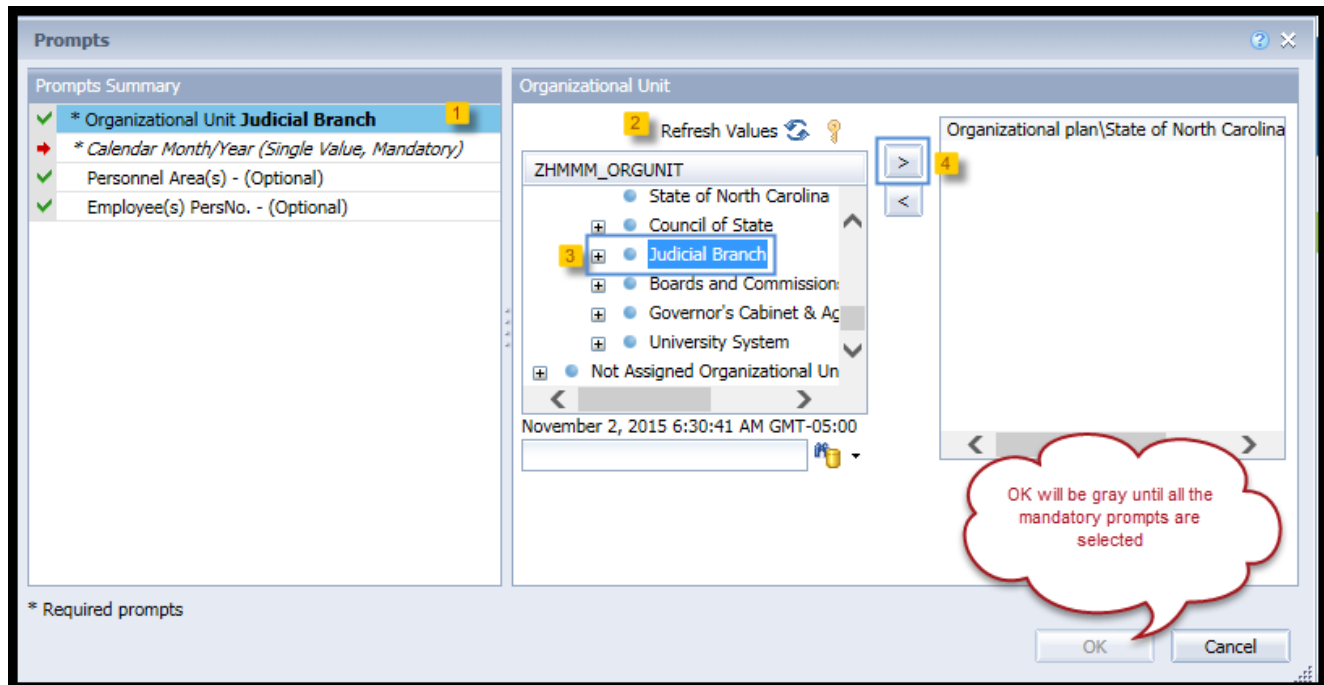
How to run this report



## Mandatory Prompts

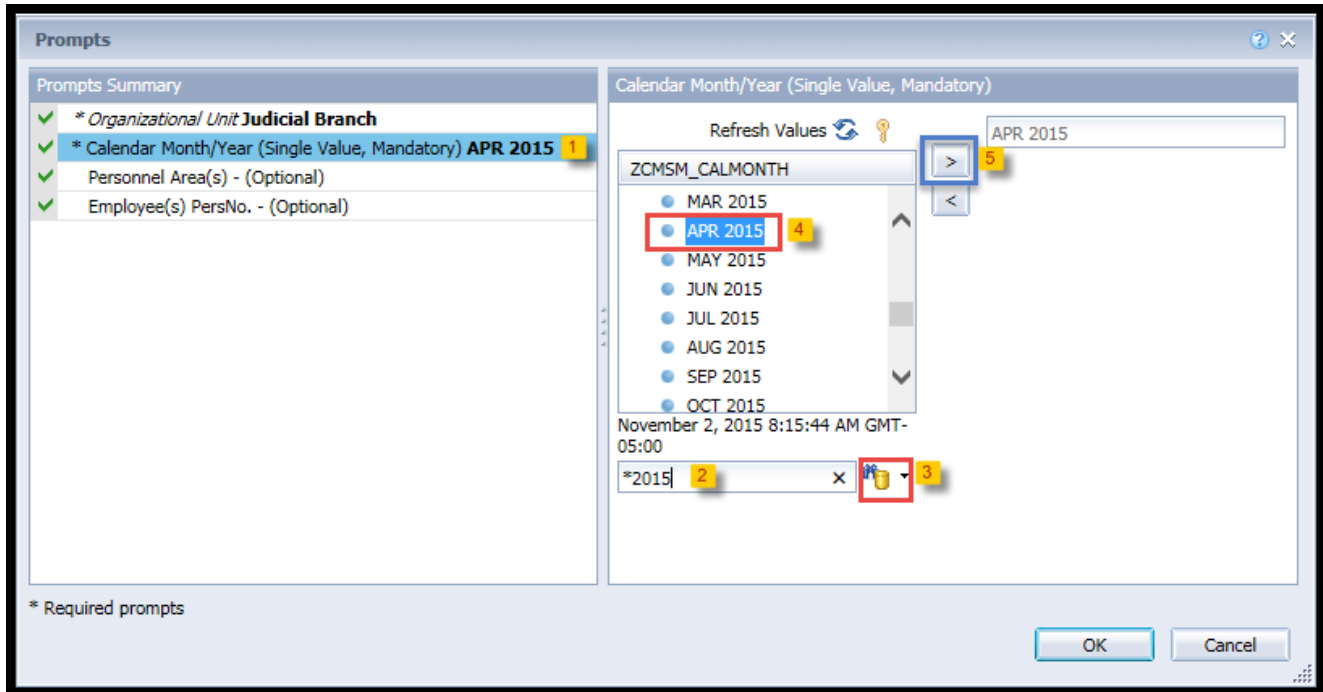
Mandatory prompts have a red arrow indicator (➔) followed by an asterisk (\*) on the left side of the prompts. When a valid value(s) is entered, this indicator will turn into a green check mark (✓).

- ➔ \***Organizational Unit:** To select data for this prompt:
- Make sure the “Organizational Unit” prompt is selected (1).
  - Click the “Refresh Values” icon to see the list of Org Units (2).
  - Navigate down to select the desired Org Unit (3).
  - Click the right arrow to add it to the selection box (4).



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- **Calendar Month/Year:** To select data for this prompt:
- Make sure the “Calendar Month/Year” prompt is selected (1).
  - Enter a wildcard year (\*yyyy) in the search field to search for available months in a specific year (2).
  - Click the search icon (3).
  - Select the desired date for your low range (4).
  - Click the right arrow to add it to the box (5).

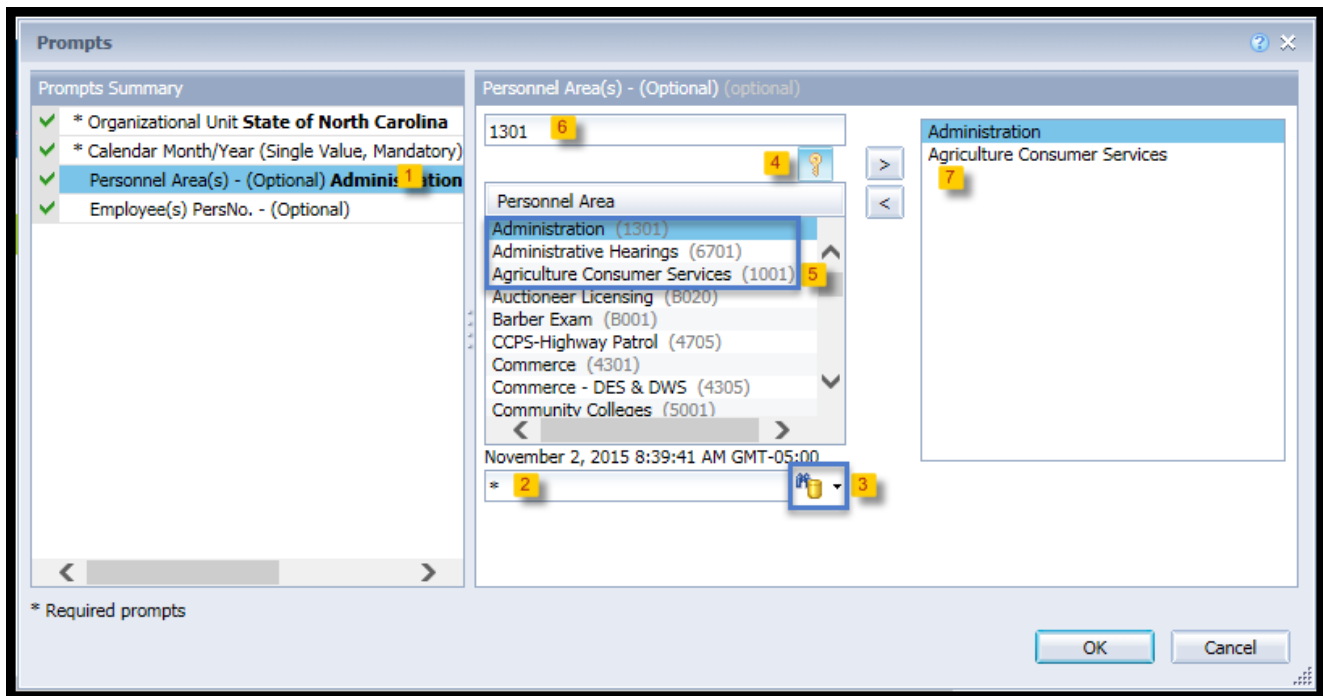


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## Optional Prompts

Optional prompts are indicated with a green check mark (✓) but are not prefilled or required. They are used to assist in further limiting the amount of data that is retrieved into the body of the report.

- ✓ **Personnel Area(s) - (Optional):** To select data for this prompt:
  - Make sure the “Personnel Area(s) - (Optional)” prompt is selected (1).
  - Enter a search text with an asterisk (\*) in the search box to view the list of values for Personnel Area (2).
  - Click the search icon (3).
  - To see the key value for each Personnel Area, click the key icon (4).
  - Select the desired Personnel Area (5).
  - **OR**, if you know the Personnel Area key or Personnel Area name, you can skip steps 2 through 5 and enter it directly in (6).
  - Click the right arrow to add the Personnel Area to the selection box (7).



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- ✓ **Employee(s) PersNo. - (Optional):** To select data for this prompt:
  - Make sure the “Employee(s) PersNo. - (Optional)” prompt is selected (1).
  - Enter an employee number in the search box to verify the employee name (2).
  - Click the search icon drop-down arrow and select “Search in key” (3).
  - Click the search icon (4).
  - To see the employee number, click the key icon (5).
  - Select the desired Employee (6).
  - **OR**, if you do not need to verify the employee number, you can skip steps 2 through 6 and enter it directly in (7).
  - Click the right arrow to add the Employee to the selection box (8).

The screenshot shows a software interface titled "Prompts". On the left, a "Prompts Summary" pane lists several prompts, with "Employee(s) PersNo. - (Optional)" highlighted and marked with a yellow "1". The main area of the dialog is titled "Employee(s) PersNo. - (Optional) (optional)". It contains a search box with the text "12345678" (7). To the right of the search box is a search icon (3) and a dropdown menu (4) with "Search in key" selected. Below the search box is a list of employees (6) with "Mickey Mouse (12345678)". To the right of the list is a right arrow (8). At the bottom of the main area, there is a date field "November 3, 2015 9:52:34 AM GMT -05:00" and another search box with the text "12345678" (2). The dialog has "OK" and "Cancel" buttons at the bottom right.

📁 **NOTE:** *Since we have a large number of employees in the system, using broad wildcard searches can be very slow and may result in an error if the search exceeds the system limit. If you do not know the employee number and must do a name search, you can narrow down your search by using the wildcard with specific text strings when looking for an employee by name such as:*

- *Mickey\*Mouse\**
- *\*Mouse*

*If you know the employee number, it is best to use the manual entry field (in step 7) to enter your selection.*

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## Initial Layout

➔ B0064 Estimated Longevity Eligibility/Length of Service tab - This report tab shows employees who are eligible for longevity payment. This is a sample of the report:

<u>B0064: Estimated Longevity Eligibility/Length of Service as of 10/2015</u>									
Organizational Unit	Organizational Unit Desc	Employee	Employee's Name	Original Hire Date	Agency Hire Date	Projected Length of Service	Annual Salary	Current Anniv Longevity Rate	Next Anniv Longevity Rate
20000004	JB Supreme Court	12345678	JOHNSON, JOHN	11/1/72	9/18/97	300	40,000	4.500	4.500

*Continued....*

Execution Date : 11/5/15												
Estimated Longevity Amount 10/2015	Estimated Longevity Amount 11/2015	Estimated Longevity Amount 12/2015	Estimated Longevity Amount 01/2016	Estimated Longevity Amount 02/2016	Estimated Longevity Amount 03/2016	Estimated Longevity Amount 04/2016	Estimated Longevity Amount 05/2016	Estimated Longevity Amount 06/2016	Estimated Longevity Amount 07/2016	Estimated Longevity Amount 08/2016	Estimated Longevity Amount 09/2016	Total Longevity Amount
0	0	0	0	0	1,800	0	0	0	0	0	0	1,800

*Note: There are totals at the end of the report.*

Length of Service	Annual Salary	Current Anniv Longevity Rate	Next Anniv Longevity Rate	Estimated Longevity Amount 10/2015	Estimated Longevity Amount 11/2015	Estimated Longevity Amount 12/2015	Estimated Longevity Amount 01/2016	Estimated Longevity Amount 02/2016
300	40,000	2.250	2.250	0	0	0	0	0
<b>Total</b>	<b>8,111,793</b>			<b>28,819</b>	<b>17,122</b>	<b>26,963</b>	<b>33,153</b>	<b>29,183</b>

Estimated Longevity Amount 03/2016	Estimated Longevity Amount 04/2016	Estimated Longevity Amount 05/2016	Estimated Longevity Amount 06/2016	Estimated Longevity Amount 07/2016	Estimated Longevity Amount 08/2016	Estimated Longevity Amount 09/2016	Total Longevity Amount
1,800	0	0	0	0	0	0	1,327
<b>21,893</b>	<b>10,639</b>	<b>15,824</b>	<b>20,958</b>	<b>13,676</b>	<b>13,665</b>	<b>6,853</b>	<b>238,748</b>

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→ **Report Info** tab – This report tab displays the values for the prompt used to execute the report:

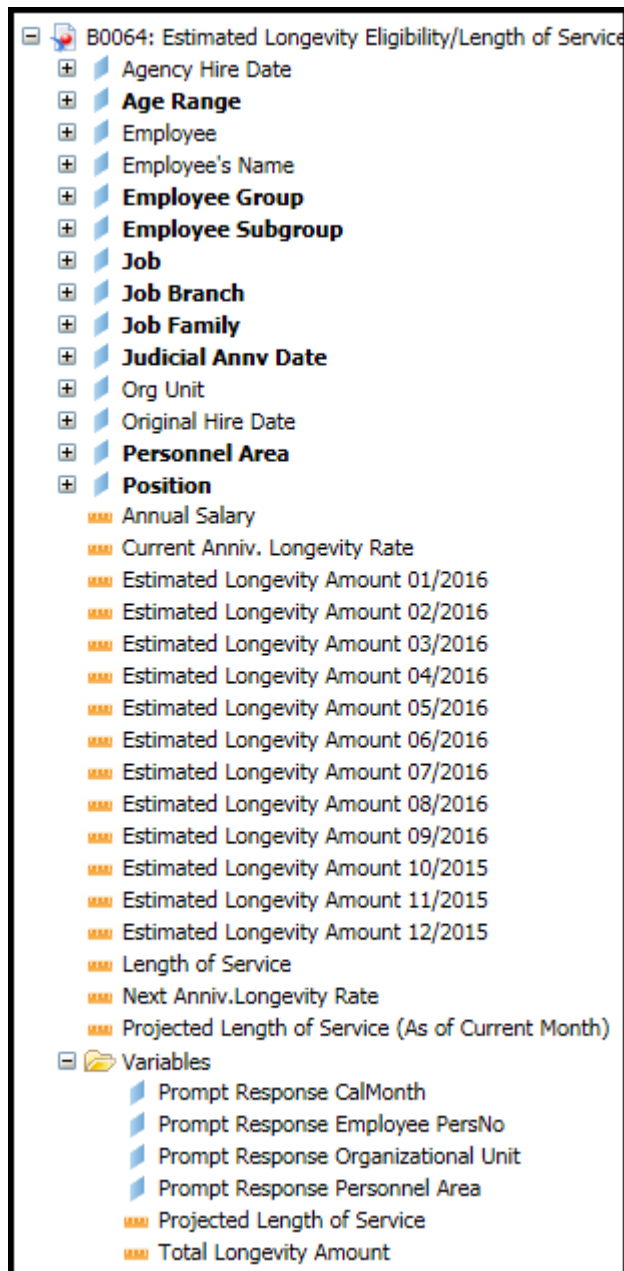
<b><u>Report Info</u></b>	
<b>Prompt Input</b>	
<b>Organizational Unit</b>	JB Supreme Court
<b>CalMonth/Year</b>	OCT 2015
<b>Personnel Area(s)</b>	
<b>Employee(s) PersNo.</b>	



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## Available Objects:

This is a list of the available objects that can be added to the report, once in Design mode:



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## Special Report Considerations/Features:

- Temporary employees are excluded by default, but this can be changed.
- Report only pulls active employees.
- The creditable state service comes from the NC Department of the State Treasurer's Orbit system and is updated monthly.
- The report displays a column for each month projected out for 12 months from the date the report is requested. The longevity amount for each employee will display in the column for the month in which the longevity is due to be paid.
- This report can be run for the current month, or as of a previous month. Future dated months are not supported. If you attempt to run the report for a future month, a message will display, "No data to retrieve in Query 1".
- When the report is run for the current month, the Projected Length of Service for each employee includes the accrual for the current month, regardless of whether or not the employee has received the accrual in ERP. In this case, the Projected Length of Service is calculated by obtaining the employee's length of service from the previous month, and then adding 1 to this value to represent the current month accrual.
- When the report is run for a previous month, the Projected Length of Service reflects the length of service accrued in ERP as of the end of the calendar month/year selected.
- To change the sorting for the desired column

Data is sorted by Personnel Area by default. (This can be changed as needed).

- Make sure the "desired column" is selected (1).
- Click the "Analysis" tab (2).
- By default, the "Display" tab is selected (3).
- Click the "Sort" drop-down icon as shown (4).
- Click "Remove all Sorts" (5).
- Make the desired selection as "Ascending or Descending" as needed (6).

Organizational Unit	Organizational Unit Desc	Employee	Employee's Name	Original Hire Date	Agency Hire Date	Length of Service	Annual Salary	Current Anniv Longevity Rate	Next Anniv Longevity Rate	Estimated Longevity Amount 04/2015	Estimated Longevity Amount 05/2015	Estimated Longevity Amount 06/2015
20000004	JB SUPREME COURT	12345678	Mickey Mouse	4/1/74	1/5/99	498	58,281	4,500	4,500	0	0	0

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## **Change Log**

<b><i>Effective Date</i></b>	<b><i>Description of Report Change</i></b>
9/9/2015	Initial creation of the report.
9/28/2017	Change length of service to include accrual for the current month if the report is run for the current month.