EMPLOYEE RETIREMENT ELIGIBILITY WITH LEAVE BALANCES

BOBJ

REPORT DESCRIPTION B0065 | CRYSTAL REPORT

The purpose of this Report Description is to explain how to generate information on employment retirement eligibility in the Integrated HR-Payroll System.

Report Description:

This report shows the number of full-time active employees that meet the criteria to be eligible for unreduced retirement benefits at a future time as specified by the user. This report displays the three categories for unreduced retirement benefits and the category for unreduced retirement benefits for Law Enforcement.

- Service Retirement (Unreduced Benefits)
- Age 65 and complete five years of membership service
- Age 60 and complete 25 years of creditable service
- 30 years of creditable service, at any age
- Age 55 and five years of creditable service (Law Enforcement)

Report also shows outstanding Sick, Vacation, and Bonus hours for each eligible employee. This report also provides employee retirement eligibility with sick leave.

Report Location:

PA: Longevity & Retirement

Report Uses:

- Assist in projecting when an employee may retire using their sick hours balance.
- Monitor possible risks to staffing levels due to potential retirement.
- Assist in budgeting when Leave balances need to be paid out at retirement.

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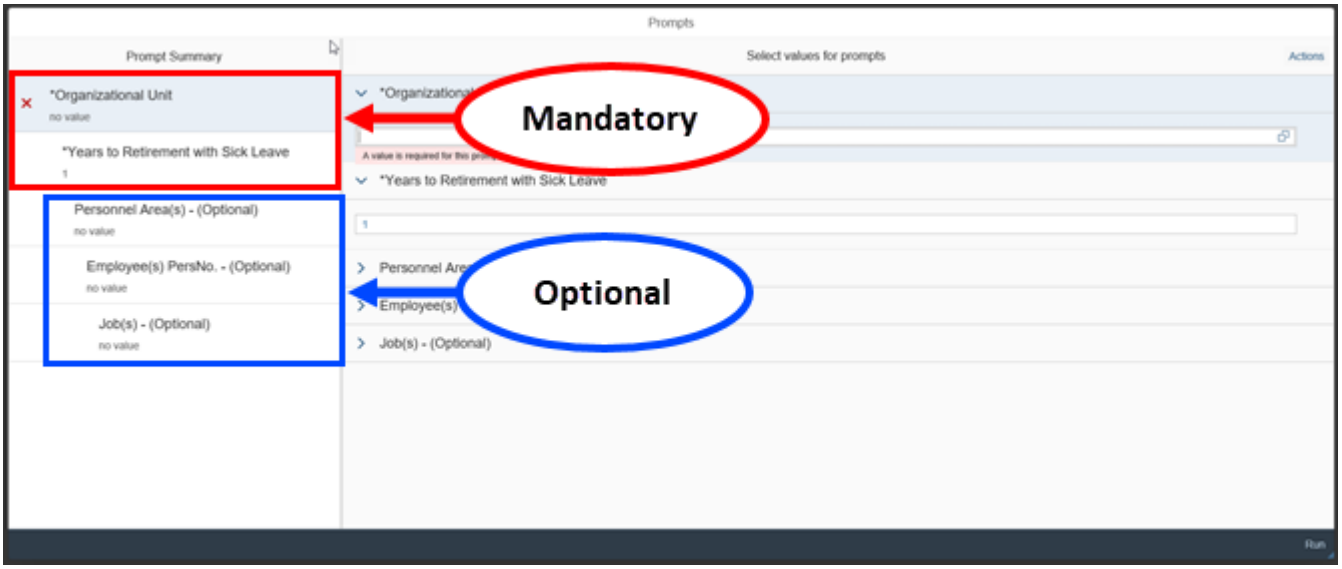
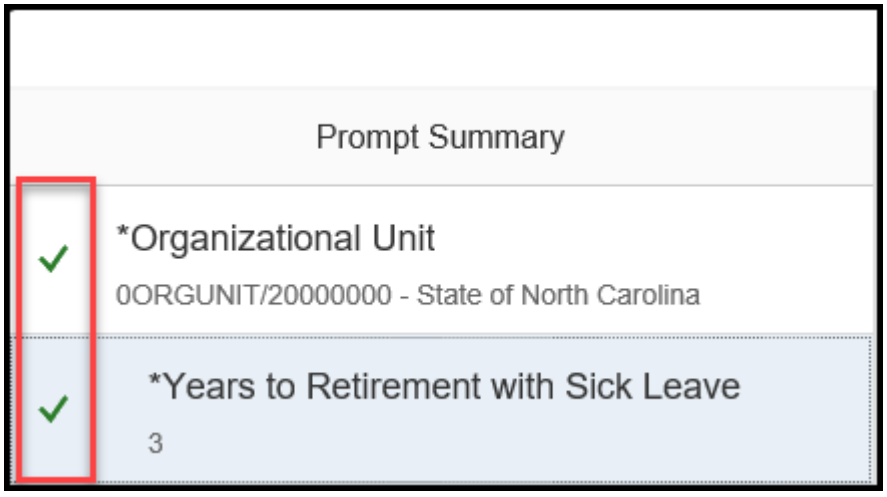
How to generate this report



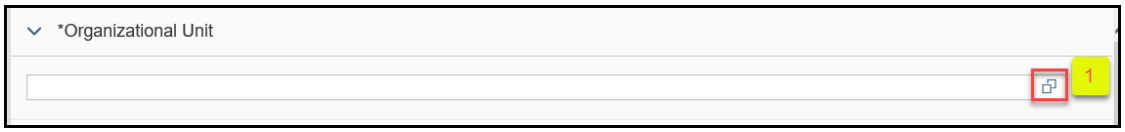
Mandatory Prompts

Mandatory prompts have 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 (✓).

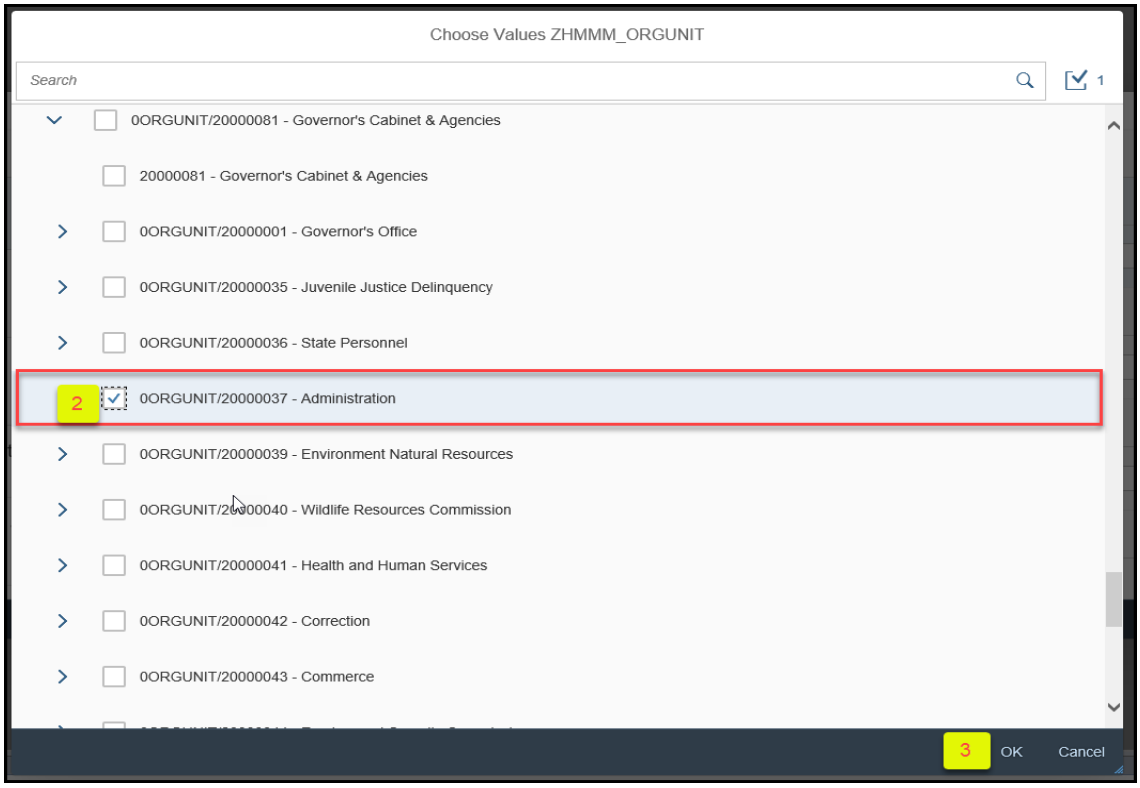


***Organizational Unit:** To select data for this prompt:

- Click the "Matchbox" icon to see the list of Org Units (1).



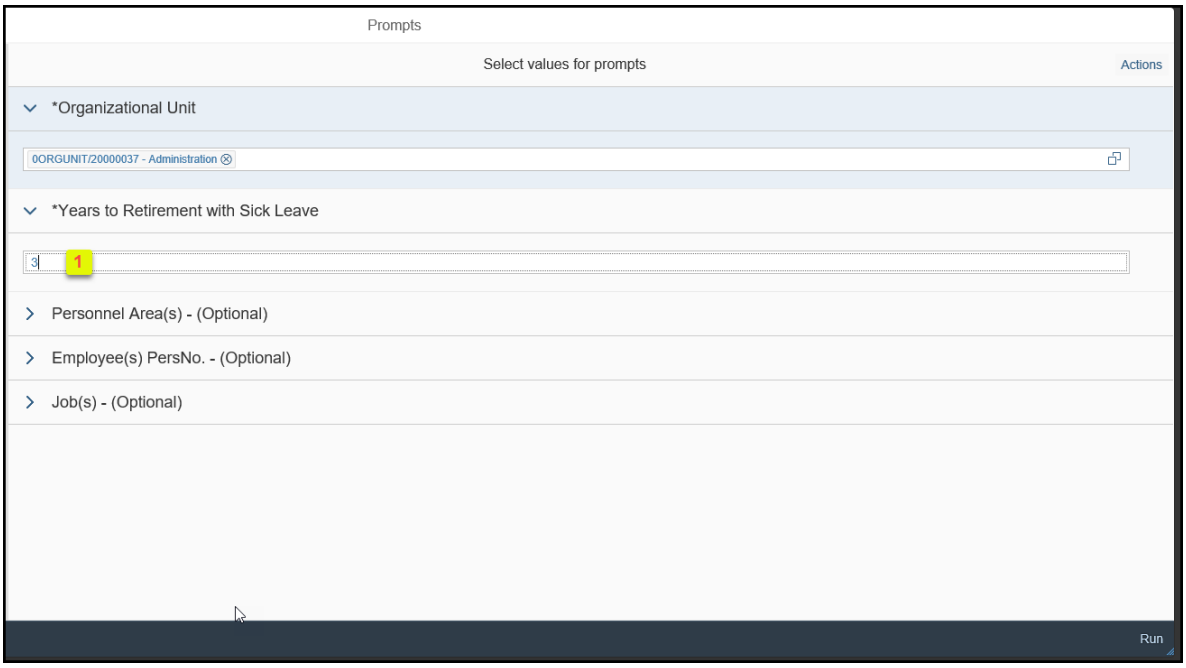
- Navigate down to the desired Org Unit, check the box to select (2).
- Click the OK to accept your selection (3).



***Years to Retirement:** This is a mandatory prompt that is prefilled with a default value.
This prompt restricts the results to employees that are projected to be eligible for retirement in the number of years specified. The default is 1 which will render results for employees that are eligible in 1 year.

To enter a different value for this prompt,

- Enter the desired value in (1).



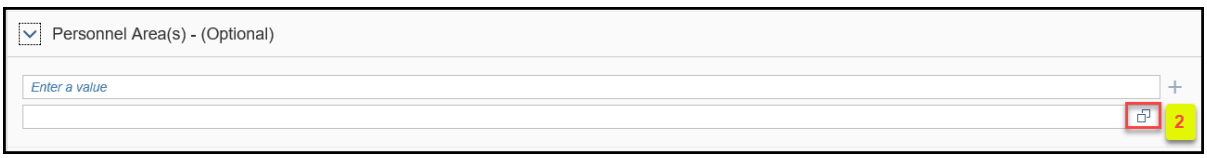
Optional Prompts

Optional prompts do not have an asterisk (*) to the left of the prompt named. They are used to assist with limiting the amount of data that is retrieved into the body of the report. The optional prompts on this report are:

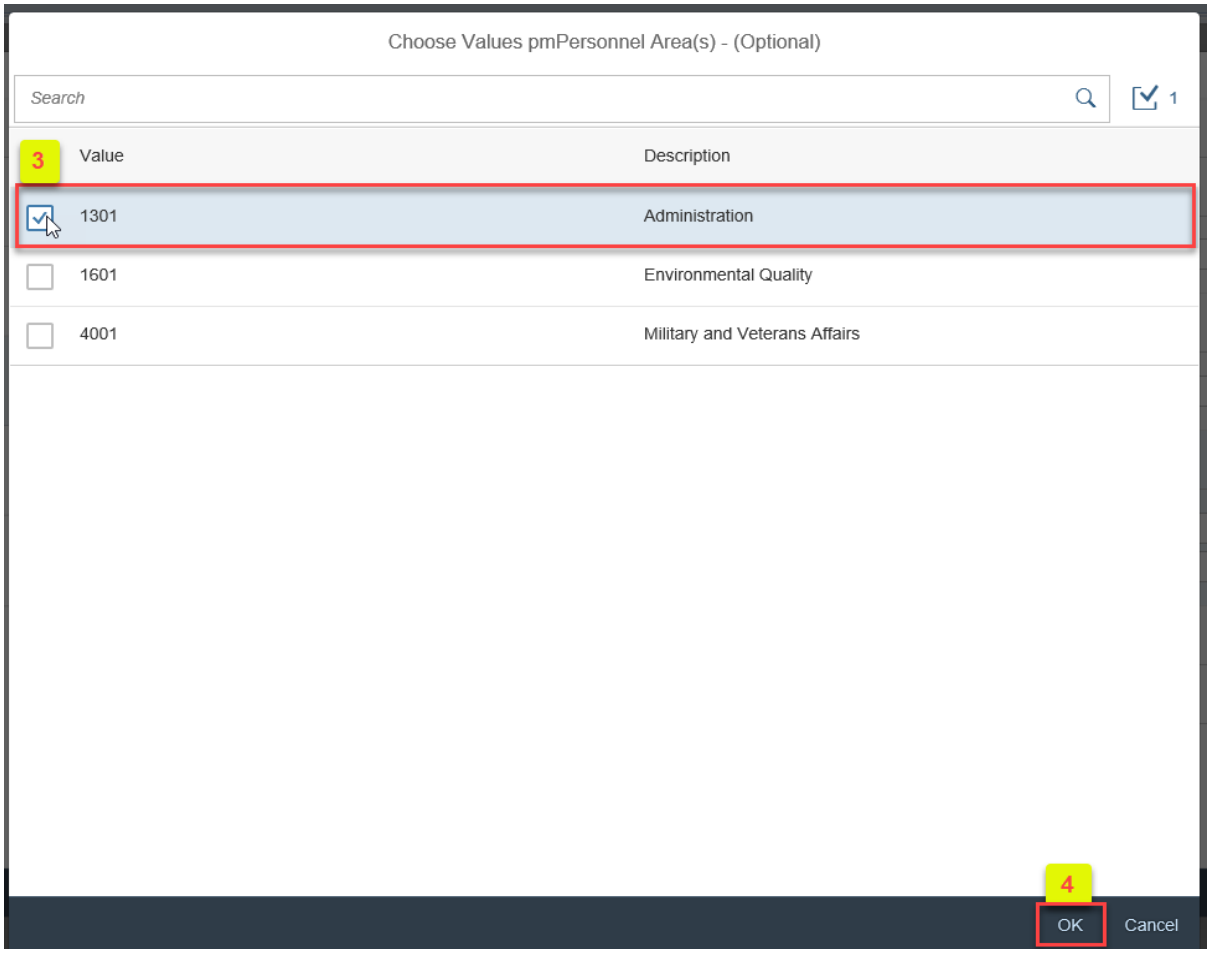
Personnel Area(s) - (Optional): To select data for this prompt,

- Click the right arrow to the left of the prompt name (1).

- Click the "Matchbox" icon (2) to see the list of Personnel Areas.



- Navigate down to the desired Personnel Area, check the box to select (3).
- Click the OK to accept your selection (4).

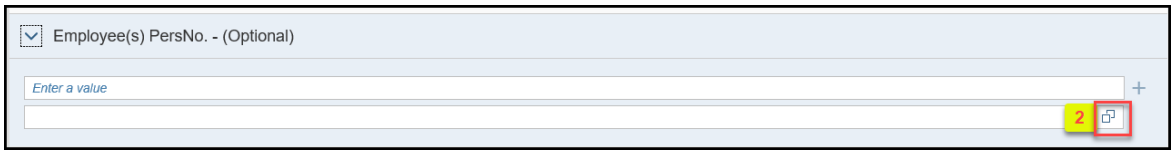


- **OR**, if the Personnel Area key is known, skip steps 2 through 4 and enter it directly in (5).
- Click the "+" icon (6) to select.

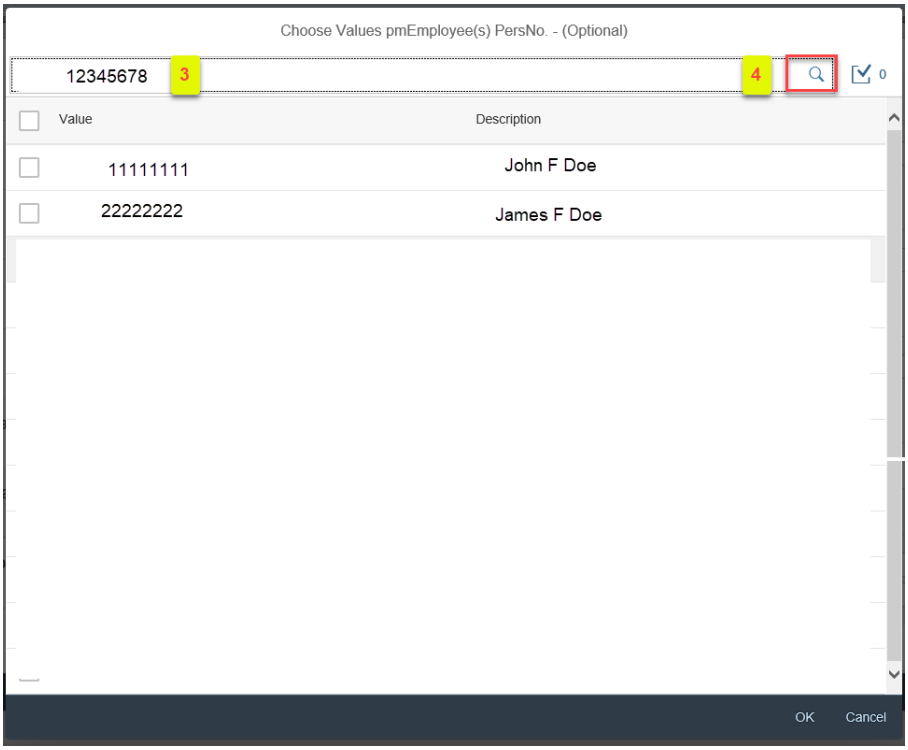
Employee(s) PersNo. - (Optional): To select data for this prompt:

- Click the right arrow to the left of the prompt name (1).

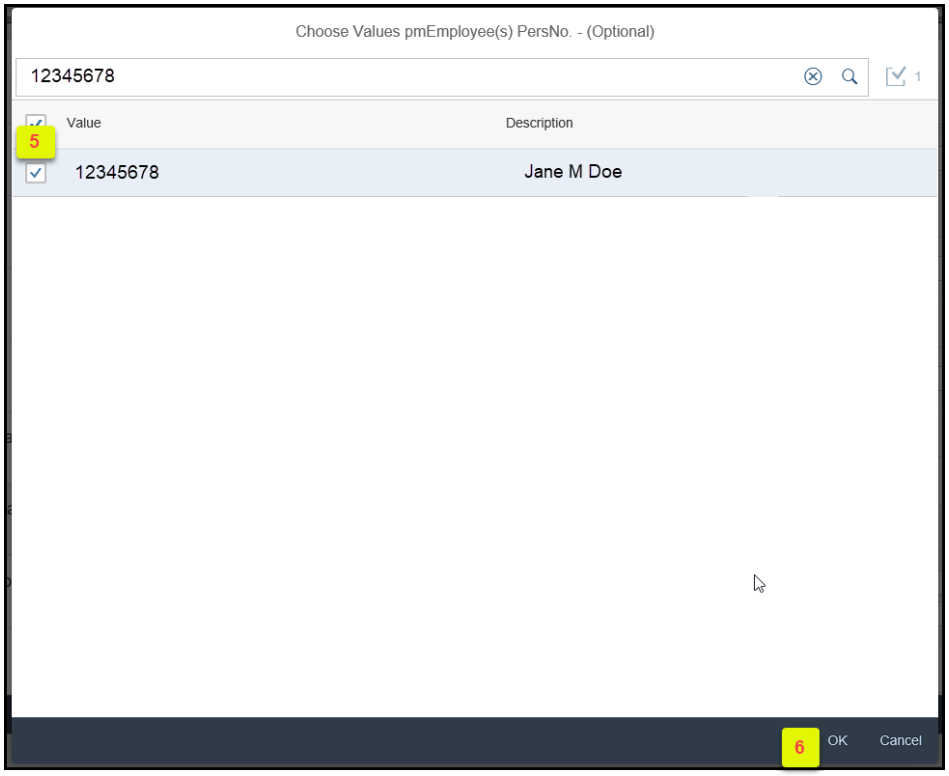
- Click the "Matchbox" icon (2) to see the list of Employees.



- Search for the employee number in the search bar (3).
- Click on the magnifying glass (4).



- Navigate down and check the box to select the desired Employee (5).
- Click the OK to accept your selection (6).

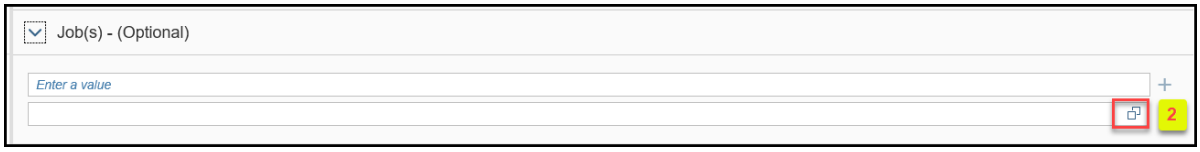


- **OR,** if the employee number is known, enter it directly in (7) and click the "+" icon (8) to select.

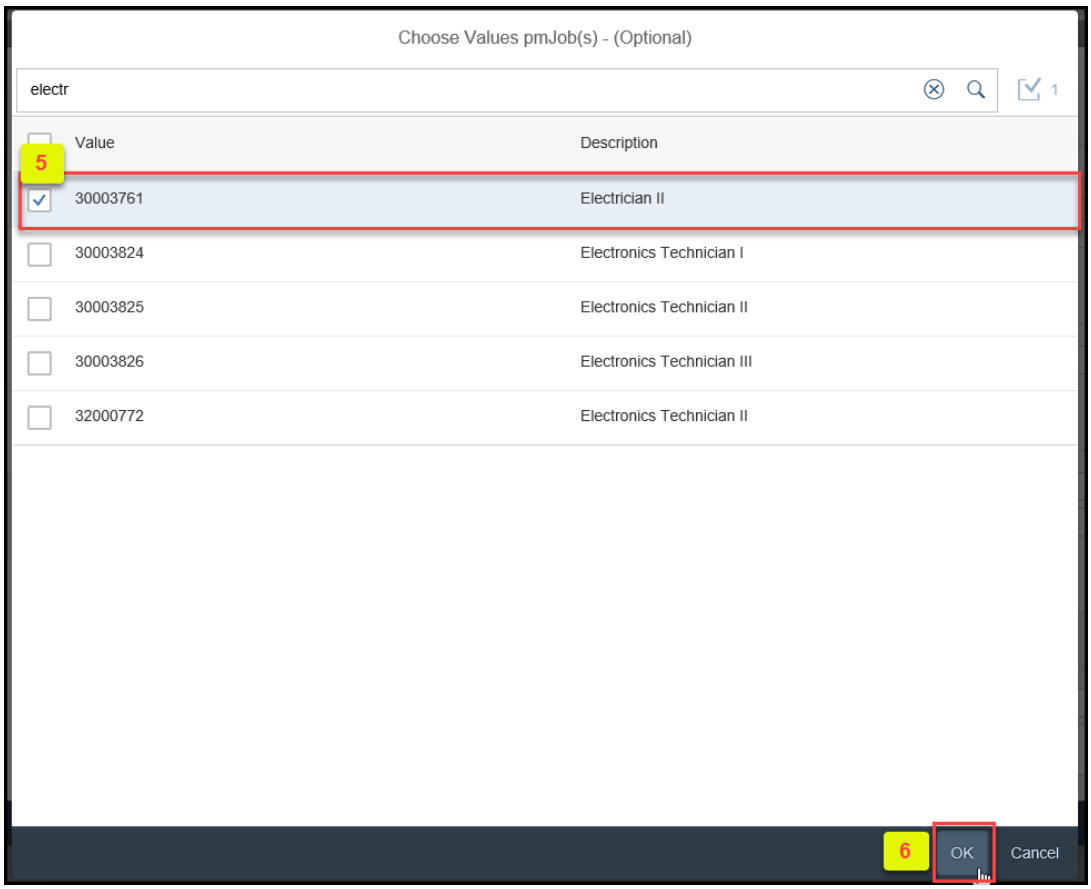
Job(s) - (Optional): To select data for this prompt:

- Click the right arrow to the left of the prompt name (1).

- Click the "Matchbox" icon (2) to see the list of Jobs.



- Navigate the desired job, check the box to select (5).
- Click the OK to accept your selection (6).



- **OR,** if the job number is known, skip steps 2 through 6 and enter it directly in (7).
- Click the "+" icon (8) to select.

Report Layout

The report lists all employees eligible for retirement based on the user input criteria. Below is a sample rendering.

State of North Carolina
B0065: Employee Retirement Eligibility w/Leave Balances
As of 8/29/20
Years to Retirement: 3

Execution Date: 9/4/20

Employee's Name	Employee	Age	Retirement Service in Years	Retirement Service in Years w/Sick Hours	Eligible to Retire	Eligible 30	Eligible 60 & 25	Eligible 65 & 5	Eligible 55 & 5	Sick Hours	Vacation Hours	Bonus Hours
Administration												
00000001 CREATIVITY SERVICES												
DOE, JOHN	12345678	67	3.6	3.6	1			1		0.00	0.00	0.00
00000002 CREATIVITY SERVICES II												
DOE, JANE	12345679	65	26.1	26.2	1		1	1		211.38	231.41	40.00
				Personnel Area - Administration	2							
				Total	2							

Special Report Considerations/Features

- Only active employees are selected.
- Temporary employees are excluded.
- Judicial consolidated employees are excluded.
- The 'As of' date represents the date that retirement data was last loaded in BI. This load runs once a week.
- Sick hours are included in the Eligibility determination.

Change Record

- 12/3/2015 – Initial report creation to convert from BI to BOBJ
- 8/2/2017 – Sick hours are included in the Eligibility determination and retirement service in years with sick hours column added
- 9/24/2020 – updated screenshots due to change in user interface, moved from Adobe Flash to HTML. There was a phase out of Adobe effective 10/22/2020.
- 10/8/2020 – Updated format, assigned reference number, and made accessible – Claire Ennis
- 10/13/2020 – Added Alt text - L.Lee