Human Resources Unit Liaisons

Retirement with Benefits Eligibility Date Presentation

Friday, November 19, 2010 – 8:30–10:30 a.m.
• SPG 201.83 provides eligibility criteria
• Projected date based on criteria available in data warehouse
• Annual Human Capital Report shows statistics for overall University
• Individuals or units contact Service Center, HR Unit Rep or HRIS to get retirement date projections
Retirement with Benefits Eligibility Date – New Functionality

Basic Functionality
- System generates a projected retirement date based on current eligibility rules. Self service and operational pages display either this projected date or xx/xx/xxxx with a qualifying message.

Conversion Program
- **Included**: regular employees who are currently active, leave, layoff, paid leave, short term work break
- **Not Included**: temp, student, regular appointments that are terminated, or retired
- **Marked ‘do not use’**: those with a current or historical appointment as House Officer, Research Fellow, Graduate Student, Fellowship or Medical School Student, Adjunct Faculty, Professional Specialist, survivor, or retiree. Also any appointment less than 4 months in duration, less than 50% effort, or otherwise ineligible for benefits.

Nightly Program
- Evaluates new hires and appointment changes either adding a record or changing the flag based on eligible benefits programs.

Display
- New operational page for Service Center and Transaction Processing Teams
- Self Service pages available to employees, managers, administrators
Retirement with Benefits Eligibility Date – Self Service

The date or additional detail will be available on the following pages in M–Pathways:

- **Employee Self Service** – Self Service>Employment Information>View Appointment or Self Service>Benefits>Benefits Summary
- **Manager Desktop** – Manager Self Service>Manager Desktop
- **Administrator Desktop** – Workforce Administration>Job Information>Review Job Information>Administrator Desktop
- **Operational Page** (for central office team use)
- **Business Objects UM Maintained Report** – HR Snap HR02 Retirement Eligibility Report (date and flag)
Retirement with Benefits Eligibility Date
Administrator Desktop Example
Retirement with Benefits Eligibility Date
Business Objects Report Example

Campus: Univ of Mich-Ann Arbor
Org Group: University Human Resources
Eligible as of: NOV2010

### Retirement Eligibility

<table>
<thead>
<tr>
<th>HeadCount</th>
<th>Currently Eligible</th>
<th>Currently Eligible %</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>% Eligible 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff</td>
<td>Manager</td>
<td>42</td>
<td>13</td>
<td>30.95%</td>
<td>15</td>
<td>17</td>
<td>19</td>
<td>21</td>
</tr>
<tr>
<td>Staff</td>
<td>Other</td>
<td>260</td>
<td>41</td>
<td>15.77%</td>
<td>43</td>
<td>48</td>
<td>58</td>
<td>63</td>
</tr>
<tr>
<td>Total:</td>
<td></td>
<td>302</td>
<td>54</td>
<td>17.88%</td>
<td>58</td>
<td>65</td>
<td>77</td>
<td>84</td>
</tr>
</tbody>
</table>

### Current Profile of People Eligible in 2015

<table>
<thead>
<tr>
<th>Eligible in 2015</th>
<th>% Women</th>
<th>% Men</th>
<th>% Minority</th>
<th>Avg Age</th>
<th>Avg Yrs Svc</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff Manager</td>
<td>23</td>
<td>65.22%</td>
<td>34.78%</td>
<td>8.70%</td>
<td>57</td>
</tr>
<tr>
<td>Staff Other</td>
<td>71</td>
<td>85.92%</td>
<td>14.08%</td>
<td>15.49%</td>
<td>57</td>
</tr>
<tr>
<td>Total:</td>
<td>94</td>
<td>80.85%</td>
<td>19.15%</td>
<td>13.83%</td>
<td>57</td>
</tr>
</tbody>
</table>
QUESTIONS