Benefits Administration

Reimplementation – HR Impacts

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Office of the CIO
June 2011
Executive Summary

Benefits eligibility process has been streamlined and is now determined by an employee’s Employee Class, Appointment Class (Reg/Temp/Term), and Standard Hours.

Employee Class is now determined by the jobcode of a position and cannot be changed in either Position or Job Data.

Position data will be synchronized with job data. Changes to position data must be made in position data and cannot be overridden in job data, unless the position has a multiple headcount. Benefits are driven by the position as it was designed and approved.

The Update Incumbents flag in position will be activated for many positions; the flag is set at the job code level. Positions with multiple headcounts (such as students and lecturers) will not have the Update Incumbents functionality.

Duplicate job codes for the same position have been eliminated. In cases where two job codes existed for the same position, the job code with the description "BE" (Benefits Eligible) was eliminated.

Some Employee Classes have been eliminated.

Only faculty positions will be designated as returning retirees.

The process for determining the primary job for benefits eligibility has changed.

The PHA incentive will appear differently on employees' paychecks.
Benefits Eligibility

- Reg/Temp/Term
- Employee Class
- Standard Hours
- Benefits Eligibility
Changes to Employee Class

Faculty
A&P
Senior A&P
CCS
Special A
Special B
Post Doc Fellow
PD Researcher
None
Visiting Aux Faculty
ONA
CL HS (No LTD)
Clinical HS with LTD
Special C
Graduate Associate
Students (Non GA)
Special D
Intern
Returning Retirees
Graduate Fellow
Contractor
Trainee
Auxiliary Faculty

Faculty
A&P
Senior A&P
CCS
Post Doc Fellow
PD Researcher
None
Visiting Aux Faculty
CL HS (No LTD)
Clinical HS with LTD
Graduate Associate
Students (Non GA)
Intern
Graduate Fellow
Auxiliary Faculty

Eliminated:
- Special A, B, C, D
- ONA
- Contractor
- Trainee
- Returning Retirees

Employee class now resides with job code and defaults into the Job Information page of Job Data

Office of the CIO
June 2011
Appointment Notes

Temporary
- Should not exceed one year, unless appointment is intermittent;
- Unclassified and CCS staff can be rehired into the same temporary position if a 6 month break in service occurs;
- Both unclassified and classified staff can be hired into another temporary position in a different department, even if employed for consecutive years;
- Temporary appointments of 30 standard hours or greater are eligible for health benefits.

Intermittent appointments
- Use "2" standard hours (not .1);
- Can be temporary appointments for more than one year.

Interns
- Can be temporary or term;
- Use job codes 5251 or 5252;
- If an intern appointment has 30 standard hours, the employee is eligible for medical, dental, and vision benefits;
- Interns are not eligible for vacation.

Post Doc Fellows
- Are "term" appointments;
- Use standard hours between 1-40 (do not use .1);
- All post doc fellows were converted to 40 standard hours; if they had multiple positions, the total position hours were rolled up to 40;
- Are not the same as Graduate Fellows (job code 4875).

Returning Retirees
- Returning retiree employee class has been eliminated, along with staff returning retiree job codes
- Returning retiree Faculty Job codes 7284 and 7286 have been retained; faculty hired with these job codes will receive the same benefits as other employees with the same standard hours and appointment class.
## Implementation Details

### July 2011

<table>
<thead>
<tr>
<th>Sunday</th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
<th>Saturday</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR system</td>
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<td>Holiday</td>
<td>HR system</td>
<td></td>
<td>1 HR system</td>
<td>2 HR system</td>
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<td>unavailable</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>(7am); BAR changes</td>
<td></td>
<td></td>
<td>BAR changes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>implemented to Position and Job</td>
<td></td>
<td></td>
<td>loaded; conversion starts</td>
</tr>
</tbody>
</table>

Position updates approved prior to 7/1, with an effective date prior to 7/1/11, will not have incumbents updated.

Position updates with an effective date prior to 7/1/11 and entered after 7/1 will not have incumbents updated; position changes must be entered in job data, and the position approval must be made using Correct History. Since the position update is retroactive, contact OHR to make the entry, and submit a retroactive job data request for the job data update.

Position incumbents will be updated when a new row is inserted into eligible positions after 7/1/11, with an effective date of 7/1/11 or later.
**Position record (MO)**

- **Position Number:** 00052497
- **Training Developer**
- **Headcount Status:** Filled
- **Current Head Count:**
- **Effective Date:** 07/01/2011
- **Reason:** POS Descr Conversion
- **Status:** Active
- **Action Date:** 05/03
- **Position Status:** Approved
- **Status Date:** 05/01/2011
- **Closure Long:** Standby
- **Closure Short:** Essential

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**Job data (MO)**

- **Baitus Bukeey:** EMP
- **WRP Location:**
- **IR Status:** Active
- **Payroll Status:** Active
- **Effective Date:** 07/01/2011
- **Sequence:** 0
- **Action / Reason:** Data Choi
  - **Conversion**

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- Over the holiday weekend, position data and job data records will be converted for all positions with a maximum headcount of 1;
- Conversion process will enable the “Update Incumbents” flag for selected job codes, and grey out their position data fields in job data;
- A new row will be inserted into position data with a reason of “Conversion;”
- A new row will be inserted into job data with an action/reason of “Data Change/Conversion;”
- Biweekly employees will have an effective date of 7/3/11; monthly employees will have an effective date of 7/1/11.
- When running the job data activity report after 7/5/11, you can exclude conversion data from the report by avoiding the dates 7/2 and 7/3/11.
Exercise – Determine Benefits Eligibility

Using the Benefits Blue Book sections on the following pages, determine benefits eligibility for these employees:

Employee #1:
One position, 30 standard hours
Appointment class: Term
Employee class: A&P

Employee #2:
One position, 40 standard hours
Appointment class: Temp
Employee class: Visiting/Aux Faculty

Employee #3
Two positions:
1) 20 standard hours
   Appointment class: Term
   Employee class: A&P
2) 10 standard hours
   Appointment class: Term
   Employee class: Visiting/Aux Faculty

Note: Visiting/Aux Faculty are not eligible for vacation
All ONA Members will be flagged as an Employee Class of A&P or Senior A&P. Because of their Union Code (100), they will have a different set of benefit eligibility which will only impact Regular/Term Appointments whose Standard Hours are between 00.00 and 19.99. Differences are marked with "ONA" in the below chart.

<table>
<thead>
<tr>
<th>Benefit Plan</th>
<th>Regular/Term Standard Hours</th>
<th>Temporary Standard Hours</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>30.00 - 40.00</td>
<td>00.00 - 19.99</td>
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<tr>
<td></td>
<td>20.00 - 29.99</td>
<td>30.00 - 40.00</td>
</tr>
<tr>
<td></td>
<td>FT Rates</td>
<td>Funding Rates</td>
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<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Health Benefits</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medical Plan</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Dental Plan</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Vision Plan</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Life Insurance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Group Term Life Insurance</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Voluntary Group Term Life Insurance</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Dependent Group Term Life Insurance</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Integrated Disability</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Short-Term Disability</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Long-Term Disability</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Workers' Compensation</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Leaves of Absence</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Family Medical Leave</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Unpaid Medical Leave</td>
<td>X</td>
<td>ONA</td>
</tr>
<tr>
<td>Organ Donation Leave</td>
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</tr>
<tr>
<td>Parental Leave</td>
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<td></td>
</tr>
<tr>
<td>Unpaid Personal Leave</td>
<td>X</td>
<td>ONA</td>
</tr>
<tr>
<td>Jury Duty/Court Appearance</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Military Leave</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Additional Time Off</td>
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</tr>
<tr>
<td>Sick Leave</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Vacation Leave*</td>
<td>X</td>
<td>ONA</td>
</tr>
<tr>
<td>Holidays</td>
<td>X</td>
<td>X</td>
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</tbody>
</table>

*Refer to Policy 6.27*
<table>
<thead>
<tr>
<th>Benefit Plan</th>
<th>Eligibility</th>
<th>Notes</th>
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<tbody>
<tr>
<td>Health Benefits</td>
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<tr>
<td>Medical Plan</td>
<td>X</td>
<td>Refer to Employee Handbook for plan details and Involuntary Termination Notice for premium rates.</td>
</tr>
<tr>
<td>Dental Plan</td>
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<tr>
<td>Vision Plan</td>
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<td>X</td>
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<td>X</td>
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<tr>
<td>Family Medical Leave</td>
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<td>X</td>
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<tr>
<td>Unpaid Medical Leave</td>
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<td>Refer to Policy 6.45 - Only Aux Fac are eligible</td>
</tr>
<tr>
<td>Organ Donation Leave</td>
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<td>Refer to Policy 6.27 - Only Aux Fac are eligible</td>
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<tr>
<td>Parental Leave</td>
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<td>Refer to Policy 6.27</td>
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<tr>
<td>Unpaid Personal Leave</td>
<td>X</td>
<td>Refer to Policy 6.43 - Only Aux Fac are eligible</td>
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<tr>
<td>Jury Duty/Court Appearance</td>
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<td>X</td>
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<td>Military Leave</td>
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<td>Refer to Policy 6.27</td>
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<td>Refer to Policy 6.35</td>
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<td>X</td>
<td>Refer to Policy 6.27 - Only Aux Fac are eligible</td>
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<td>X</td>
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