

Eligibility for Retirement Report

(12/2010)

Purpose: Displays a list of employees to assist managers with predicting retirement dates and consider succession planning for their workforce.

Access: Individuals with SAP security role of Department Head, Supervisor, or Departmental Time Administrator.

SAP Transaction: ZHRRETELIG

Steps to run the report:

Enter your desired selection criteria and click Execute.

The screenshot shows the SAP transaction ZHRRETELIG. The title bar reads "Retirement Eligibility Report". Below the title bar are navigation icons and two buttons: "OrgStructure" and "Search Help". The main area is divided into two sections: "Selection Criteria" and "Report Selection".

Selection Criteria:

Field	Value	Action
Person ID		→
Employment Status	≠ 0	→
Personnel area		→
Personnel subarea	0001	→
Employee group	≠ C	→
Employee subgroup		→
Payroll area		→
Organizational unit		→
Job		→

Report Selection:

As of Date	03/30/2010
Layout	

Selection criteria

Person ID – can limit the search to one or more employees

Employment Status – active, inactive or withdrawn; usually want to use default of “not withdrawn”.

Personnel area – can search by division

Personnel subarea – use the default of 0001 and 0002 (benefits eligible)

Employee group – use the default of “not equal to students”

Employee subgroup – n/a for this report

Payroll area – n/a for this report

Organizational unit – can limit the search to one or more org units (departments)

Job – can limit the search by job title

As of Date – used to determine as of what date an employee’s age and years of service should be calculated. The default is the current date.

Interpreting the results:

The default layout provides the following:

Years of Service

- Employees receive one year of service credit by working in a benefits-eligible position ($\geq 50\%$ FTE) for at least 4.5 months in a fiscal year (September – August)
- Service since the last *continuous* hire date is included
- Previous periods of employment at Texas State prior to 12/1/04 are not included
- Eligible service credit at another employer is not included
- The “as of date” determines if the current fiscal year is counted. For example, as of 1/10/11 would not count FY11. Using as of 1/16/11 would be counted as a year from 9/1/10 – 1/15/11.

Rule of 80

Calculated by adding the employee’s age on the “as of date” plus years of service credit.

Years until Eligible

An employee is eligible for regular service retirement (with no early age penalty) when one of the following is met:

- Age + yrs of service ≥ 80 with at least 5 yrs of service, or
- Age ≥ 65 with at least 5 yrs of service.

Years until eligible are the number of years an employee needs to work to reach the minimum criteria. For example, age 50 +22 yrs = 72. This employee must work 4 more years (and will age 4 years) to be age 54 + 26 yrs = 80. Zero years until eligible means the employee has already met the minimum criteria but has elected not to retire yet.

Eligible to Retire

Indicates yes or no based on the minimum regular service retirement criteria outlined above.

Prior State Service

Indicates yes or no whether the employee has any state service credit before their most recent hire date. This service may or may not be considered eligible for retirement credit, but it can be used as a flag to investigate further. Service is only counted if the employee contributes toward retirement (TRS, ORP, ERS). This excludes any student or non-benefits eligible positions.

Also, an employee may have other service eligible for special service purchase with TRS such as withdrawn, military, out-of-state, etc. or service with a public school district that would not be reflected in SAP records.

Using “Change Layout”, other fields are available for output including FTE, gender, date of birth, ethnicity, tenure status, username, and retirement plan.

Questions: for assistance running or interpreting the report, please contact a member of the HR benefits staff at 245-2557 or hr@txstate.edu.