

# Impact of Oracle Human Resources Record on Benefits, Retirement, Leave, and Reporting

## Purpose

This document describes how an employee record in the Research Foundation (RF) business applications impacts benefits data, retirement data, and compliance reporting.

## Background

An employee record in the RF business applications is the sole data source for retirement eligibility and contributions, benefits eligibility, leave accruals, and for regulatory reporting to the federal government for such areas as Medicare or Affirmative Action. Therefore, incorrect and/or insufficient data has a direct and adverse affect on these areas. Incorrect data can result in the wrong retirement service credit, inaccurate benefits eligibility and accruals, overpayments to insurance carriers, and inaccurate federal compliance reporting.

## People Form

The following table lists the fields from the People form in Oracle that are data sources for benefits, retirement, and reporting with a brief description of the impact on benefits, retirement, and reporting, and additional system information.

| Field          | Impact                                                                    | System Information                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|----------------|---------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Hire Date      | Leave Accrual -<br>Determines the rate at which an employee accrues leave | <p>The Hire Date is the system-generated date in effect when the person was first entered into the system. This date determines an employee's accrual rate and tier code in retirement, unless there is a break-in-service.</p> <p>If the Hire Date is not the date to be used for the RF accrual rate, the date to be used for accrual rates must be entered on the accrual element as the Continuous Service Date to override the "Hire Date."</p> <p><b>Note:</b> If the system generated Hire Date is not the person's original hire date as an RF employee, that information should be entered in Special Information in the data under Service Date Information.</p> |
| Ethnic Origin  | Compliance Reporting -<br>Affirmative Action Plan                         | <p>The Ethnic Origin field must be populated for all RF employees. It is used in compliance reporting and Affirmative Action Plans.</p> <p>This field should also be populated for fellowship recipients.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Veteran Status | Compliance Reporting                                                      | <p>Veteran Status must be completed for any RF employee who self- identifies in one of the veteran categories in compliance with federal VETS 100 report of veteran employees.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |

## People Form - Special Info

The Special Info button in the People form gives the user access to a series of information lines, one of which is Service Date Information. The Service Date Information is the source of the date a person is first hired as an employee. It must be

maintained to document an employee's service termination dates and termination reasons. Failure to complete and maintain the fields in this section can result in inaccurate reports.

The following table lists the fields from the People form - Special Info area that are data sources for benefits, retirement, and reporting with the area of impact and additional system information.

| Field                   | Impact                                                             | Additional Information                                                                                                                                                                           |
|-------------------------|--------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Original Hire Date      | Reporting and querying                                             | The Original Hire Date is the date a person is first hired by the RF as an employee. This date never changes.                                                                                    |
| Original Fellow Date    | Reporting and querying                                             | The Original Fellow Date is the date a fellowship is awarded to a person. This date never changes.                                                                                               |
| Continuous Service Date | Reporting and querying                                             | The Continuous Service Date should be populated with the date on which a terminated employee is rehired. There may be multiple entries if an employee has terminated and rehired more than once. |
| Termination Date        | Reporting and querying                                             | The Termination Date is an employee's last date worked. This will change if an employee terminates, rehires, then terminates, rehires, etc.                                                      |
| Termination Reason      | Reporting - This is the only place the Termination Reason is kept. | The Termination Reason is the reason for the termination on the date entered in the field above. It is selected from the list of values.                                                         |

## Assignment Form

The following table lists the fields from the Assignment form that are data sources for benefits, retirement, leave accruals, and reporting with the area of impact and additional system information.

| Field             | Areas of Impact                                                                    | Additional Information                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|-------------------|------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Status            | Retirement and Reporting                                                           | The Status is the source for an employee's service with the RF. When an employee terminates, whether salaried or hourly, the assignment status must be updated to Terminated - Processes Pending, effective the day after the last day worked. This is detailed in the work instruction "Terminate a Person."<br><br>Furthermore, the status will automatically be updated to Terminated-Do Not Process after an appropriate interval. If a terminated employee is rehired, the correct date must be used when changing the status back to Active Assignment. This data is used to determine retirement eligibility and vesting, and benefit eligibility. |
| Assignment Group  | Benefits Eligibility - Determines type of coverage: Student, Fellow or Employee    | In the Group Flexfield, the Assignment Group defines a person's specific relationship to the RF. The Assignment Group helps determine the benefits for which a person may be eligible. For example, a fellow is NOT eligible for retirement.                                                                                                                                                                                                                                                                                                                                                                                                              |
| Job and Grade     | Compliance Reporting - Affirmative Action Plan                                     | The Job and Grade fields are used for Affirmative Action Plan reporting to comply with federal regulations.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Employee Category | Leave Accruals<br><br>Determines whether nonexempt or exempt accruals are applied. | The Employment Category, found in the middle of the Assignment Form, is used to determine which accrual elements may be added to a record. For example, if the category is Exempt-Regular, only Exempt PTO accrual elements are valid entries for the record                                                                                                                                                                                                                                                                                                                                                                                              |

## Assignment Form - Additional Assignment Details

The flexfield on the Assignment Form, Salary Information window, opens the Additional Assignment Details window, which is the primary data source for benefits eligibility and retirement service credit for all RF employees. The following table lists the fields from the Additional Assignment Details window that are data sources for benefits, retirement, and reporting with a brief description of the impact on benefits, retirement, and reporting, and additional system information.

**Note:** Population of a 0.00 entry in all of these fields terminates an employees benefits. When the assignment status is set to either "Terminate – Processes Pending" or "Terminate - Do Not Process," the fields below will be automatically populated with a 0.00 entry via an overnight process.

| Field              | Areas of Impact                                                                                                                                                                                                                                                                  | Additional Information                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|--------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| FTE                | Leave Accruals - Determines whether the employee accrues leave at the full or pro-rated (if part-time) rate<br><br>Benefits Eligibility - Determines eligibility and break in service<br><br>Retirement Service Credit - Determines hours of service for eligibility and vesting | The FTE field represents the total effort of a salaried (not hourly) employee, regardless of the number of his/her assignments. Only 1 assignment is Primary and that one should hold the person's total effort on all assignments and should be the one on which all elements such as health insurance and accruals are entered and maintained.<br><br>The FTE field must always reflect a salaried employee's current total effort and be updated whenever the FTE changes. The total effort determines whether the employee accrues leave at the full or pro-rated (if part-time) rate and the retirement service credit for a salaried employee.<br><br>be set at 0.00 non-employees. |
| Benefit Hours      | Benefits Eligibility and Retirement Service Credit                                                                                                                                                                                                                               | The Benefit Hours field is system-generated when hours are entered for a non-exempt employee. This field determines an hourly employee's retirement service credit and eligibility for benefits.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| Annual Benefit Pay | Benefits Eligibility for Students and Fellows                                                                                                                                                                                                                                    | The Annual Benefit Pay field is system-generated from the Salary form when payroll processes. This field determines student and fellow eligibility for health insurance. Data in this field is populated from the person's Salary Administration form whenever payroll runs and from additional earnings elements added to the employee record.                                                                                                                                                                                                                                                                                                                                           |

## Change History

- **December 5, 2005** - Updated to specify that the Hire Date field determines an employee's tier code in retirement.
- **December 28, 2004** - Revision "Assignment Form" sections, FTE, Benefit Hours and Annual Benefit Pay, to reflect automation of 0.00 entry in benefits eligibility DFF for non-employees.
- **October 17, 2002** - New document.

### Feedback

Was this document clear and easy to follow? Please send your feedback to [webfeedback@rfsuny.org](mailto:webfeedback@rfsuny.org).