City of Milwaukee

Department of Employee Relations

Benefits Service Date (BSD) Current Procedure

The benefits service date (BSD) is a calendar year so it must be maintained in calendar days. The BSD drives vacation accrual, if it's not maintained the employee will be overstated (or possibly understated) for vacation accrual. It does not automatically update when an employee has unpaid time. Payroll clerks must maintain this date in HCM to ensure the employee does not get over credited on vacation accrual.

If an employee has unpaid time, the BSD should be maintained as soon as the employee returns to work. If you do not they can be overstated on their vacation.

Less than full time employees:
- If a benefited employee (full/part schedule of either half time or more than half time) and you need to adjust the BSD, you do not convert the calculation. Treat them as they are whole, because in a sense they are in that status.

How to count unpaid time:
- Unpaid time should be calculated in Years, Months, then Days based on a true calendar, not just work days, unless indicated below.
- Days to count – **read this entirely, not just the bullet point you are looking for**. Based on the employee's work schedule and FTE:
    - Unpaid time includes but not limited to: Unpaid hours (for the purpose of 51% of a shift or more – see next bullet point) or days on the time card including unpaid FMLA, AWOL, LOA for personal/medical/other reasons, Suspension (see suspension section), layoff, and any other time off payroll. If the unpaid time includes a holiday – the holiday date should be included in the days counted for updating the BSD.
    - If the employee is UNPAID 51% of the shift or more, that counts as a full day of unpaid time; take the entire day off the BSD.
        - Alternatively, if the employee is paid 50% of the shift or more, this day does not count against them for the purpose of deducting UPT from the BSD.
        - Examples:
            - An employee scheduled for 40 hours a week/8 hour a day:
                - The employee is unpaid for 4.1 hours in a day. This will count as an entire day of UPT.
                - The employee is unpaid for 4.0 hours in a day, alternatively the employee was paid for 4.0 hours in the same day. This will NOT count as any UPT. This counts as a day worked as the employee was paid for 50% of the shift or more.
            - An employee is scheduled for 20 hours a week /5 hours a day for 4 days, the off day being on Wednesdays.
                - The employee is off unpaid 2.6 hours on a Monday. This will count as an entire day of UPT.
                - The employee is off unpaid 2.5 hours on a Monday, alternatively was paid for 2.5 hours on the same day. This will NOT count as any UPT. This counts as a day worked as the employee was paid for 50% of the shift or more.
    - If the unpaid time spans a holiday or weekend, those are calendar days and must be counted as part of the unpaid time calculation.

- For example, if the employee is unpaid Thursday and Friday (normal schedule is M-F), and returns to work on Monday. They may have only been off work 2 days, but you would take 4 days off the BSD.
- **Rule of thumb here is the "leave" starts the day after last day on payroll (you would interpret as unpaid time).

Suspensions:
- Update the benefits service date with the count of work days the employee was suspended from work, do not count weekends when an employee is serving a suspension.

Rehire/Reinstatement:
- **Rehire:**
  - Effective 4/12/2022 DER created a "Benefits upon Rehire" policy.
    - https://city.milwaukee.gov/ImageLibrary/Groups/derAuthors/Policies/BenefitsUponRehire.pdf
    - Employee's rehired under the provisions of this policy will be allowed to have their service credit restored without having reinstatement granted.
  - Upon a rehire entry, be sure to evaluate <u>every time</u> if the benefits service date should be updated.
- **Reinstatement:**
  - If an employee is reinstated, verify the reinstatement type.
  - If it's for salary purposes only, they are not receiving vacation credit. When this happens, you must reset the BSD to the date of rehire.
  - If the employee is reinstated with full rights, or with vacation rights, you must update the BSD for time off payroll.
- If you ever question a "Rehire" entry, by this we mean the action of Rehire, and how/when to update the BSD, please email derpayservices@milwaukee.gov for guidance on what time to count.

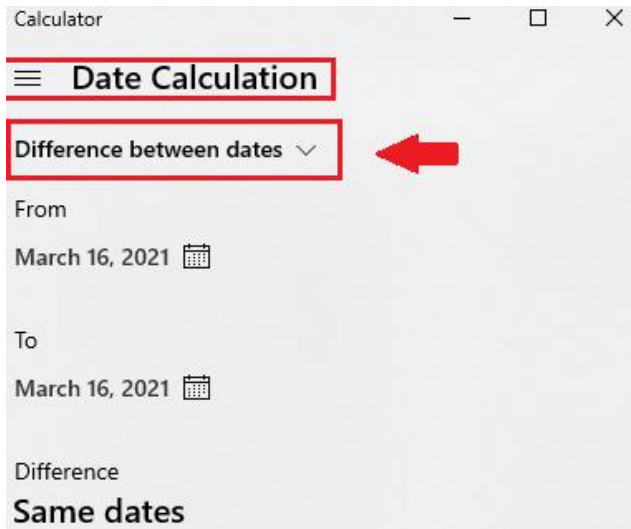**<u>How to Calculate the Updated Benefits Service Date - Very helpful tool:</u>**
https://www.timeanddate.com/
Under the calculator's dropdown:
- Date to Date Calculator
  - Use this to figure out Years, Months, and Days between 2 dates
  - Be mindful of the "Include end date in calculation" button for accurate calculations
- Date Calculator: Add to or Subtract from a date
  - Use this to add (or subtract) Years, Months, and Days to an existing date once you determine the amount of time that date must be adjusted by

Alternatively, you can look at the calculator app on your computer. If it has a mode to change to "Date Calculation", and you have options for both "Difference between dates", and "Add or Subtract Days", you can use this app instead of the website above. However, use it in the same fashion as explained above.

How to enter a Benefits Service Date update in HCM Job Data:

Once you have calculated your updated BSD, you will need to update it in HCM Job Data. Here is some guidance on what method to follow for the reason you need to update the date.

Updating the BSD due to Unpaid time on a Time Card including FMLA:

When this happens, insert a new row in job data effective dated the first date of the current pay period and update the BSD. Entry:

- Effective Date: First Date of Current PP
- Action = Data Change
- Reason = Adjust Service Date (BSD)
- On the Employment Data Hyperlink (Bottom of Page), update the BSD. If it's un-editable, click the override button to change the date.
- Save the Entry.
- Create a general comment (Path: Workforce Administration – Personal Information – Biographical – General Comments)
    - o The comment should include your full name, the date you made the change. And in the note the following information. BSD updated on job data row effective dated ___, old BSD ___, updated BSD ____. BSD updated due to __(indicate why such as UPT on time card, FMLA on time card, LOA, suspension, etc.). BSD updated by # of day's ___. Then include the exact dates you adjusted _____.
    - o ***General comments are your permanent record of adjusting the BSD. You must be detailed with how, why and the exact dates you adjusted. If the employee moves around in the city this record moves with them. Not your internal files.

Updating the BSD due to any type of LOA entry in HCM Job Data:

- On the entry the employee returns from LOA that you will enter in HCM Job Data, you will update the BSD at that time.
- On the Employment Data Hyperlink (Bottom of Page), update the BSD. If it's un-editable, click the override button to change the date.
- Save the Entry.
- Create a general comment (Path: Workforce Administration – Personal Information – Biographical – General Comments)
    - o The comment should include your full name, the date you made the change. And in the note the following information. BSD updated on job data row effective dated ___, old BSD ___, updated BSD ____. BSD updated due to __(indicate why such as UPT on time card, FMLA on time card, LOA, suspension, etc.). BSD updated by # of day's ___. Then include the exact dates you adjusted _____.
    - o ***General comments are your permanent record of adjusting the BSD. You must be detailed with how, why and the exact dates you adjusted. If the employee moves around in the city this record moves with them. Not your internal files.

Updating the BSD due to employee returning from Layoff in HCM Job Data:

- On the entry the employee returns from Layoff that you will enter in HCM Job Data, you will update the BSD at that time.
- On the Employment Data Hyperlink (Bottom of Page), update the BSD. If it's un-editable, click the override button to change the date.
- Save the Entry.
- Create a general comment (Path: Workforce Administration – Personal Information – Biographical – General Comments)
    - o The comment should include your full name, the date you made the change. And in the note the following information. BSD updated on job data row effective dated ___, old BSD ___, updated BSD ____. BSD updated due to __(indicate why such as UPT on time card, FMLA on time card, LOA, suspension, etc.). BSD updated by # of days ___. Then include the exact dates you adjusted _____.

- o ***General comments are your permanent record of adjusting the BSD. You must be detailed with how, why and the exact dates you adjusted. If the employee moves around in the city this record moves with them. Not your internal files.

Updating the BSD due to employee returning from Suspension in HCM Job Data:
- On the entry the employee returns from Suspension that you will enter in HCM Job Data, you will update the BSD at that time. **Remember not to count weekends.**
- On the Employment Data Hyperlink (Bottom of Page), update the BSD. If it's un-editable, click the override button to change the date.
- Save the Entry.
- Create a general comment (Path: Workforce Administration – Personal Information – Biographical – General Comments)
    - o The comment should include your full name, the date you made the change. And in the note the following information. BSD updated on job data row effective dated ___, old BSD ___, updated BSD ____. BSD updated due to __(indicate why such as UPT on time card, FMLA on time card, LOA, suspension, etc.). BSD updated by # of day's ___. Then include the exact dates you adjusted _____.
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Updating the BSD due to employee being Re-hired to the City in HCM Job Data:
- Evaluate if it's a standard Rehire (no service credit) or a Reinstatement (Adjust service credit for time away)
    - o Remember to adjust Paid Time off Balances in City Time so they are not holding on to balances they are not entitled to.
- On the Employment Data Hyperlink (Bottom of Page), update the BSD. If it's un-editable, click the override button to change the date.
- Save the Entry.
- Create a general comment (Path: Workforce Administration – Personal Information – Biographical – General Comments)
    - o The comment should include your full name, the date you made the change. And in the note the following information. BSD updated on job data row effective dated ___, old BSD ___, updated BSD ____. BSD updated due to __(indicate why such as UPT on time card, FMLA on time card, LOA, suspension, etc.). BSD updated by # of day's ___. Then include the exact dates you adjusted _____.
    - o ***General comments are your permanent record of adjusting the BSD. You must be detailed with how, why and the exact dates you adjusted. If the employee moves around in the city this record moves with them. Not your internal files.