



DEPARTMENT OF EMPLOYEE RELATIONS

[February 20, 2023]

Longevity PP5 2023 – Payroll Instructions and FYIs **Revised 2/20/2023**

The 2023 Budget approved a 1% longevity increase effective PP 5, 2023 for eligible employees:

1. Each department will be responsible for entering the longevity entries in to Peoplesoft HCM for their eligible employees within PP 5, 2023.
 - a. Please start making these entries as soon as you are able once HCM is released from Comptroller's Office for use.
 - b. Entries are to be made by payroll close of PP 5, 2023 for all eligible employees (all entries are due close of business Friday March 3rd, 2023 in HCM).
 - i. Retro pay is not applicable as these increases are being entered when they are effective.
 - c. Longevity pay increase will show up on eligible employee's paychecks dated 3/16/23.
2. How will the longevity raise program work?
 - a. Longevity increases (explained below) will happen once per year as allowed per budget office, annually in PP 5 of each year.
 - b. Employees will only be eligible under this program for 1 longevity increase in their career.
 - c. Employees have to be eligible for longevity per all requirements listed in this document to receive the longevity footnote adjustment in PP 5. If they do not meet the criteria at that time, they may become eligible for it should the program return the following year in PP 5.
 - i. To be clear, if the employee becomes eligible during the year, they would see the footnote adjustment the following year in PP 5.
3. What Classifications are Eligible?
 - a. Regularly appointed General City employees, non-sworn Fire and Police department staff, and sworn non-represented management personnel in Fire and Police departments.
 - i. Employees would have been hired off an eligible list, are on an exempt appointment in a benefit eligible title, and are not in a temporary employment capacity.
 - b. Employees who have a Benefits Service Date (BSD) that includes 5 years of service or more as of March 4, 2023 (last date of PP 5, 2023).
 - c. Fields in HCM to help identify:
 - i. Regular/Temporary = Regular.

- ii. Benefits Service Date = 5 years or greater as of the eligibility date of March 4, 2023.
 - 1. **BSD would be a date of 3/4/18 or older.**
 - iii. Any Full/Part status, or FTE as long as you meet the eligibility criteria.
4. What Classifications are not Eligible?
- a. Job titles listed in the following sections of the Salary Ordinance are excluded:
 - i. Part 1, Section 9 of the Salary Ordinance “Part-Time and Intermittent.”
 - ii. Part 1, Section 10 of the Salary Ordinance “Boards and Commissions.”
 - iii. Part 1, Section 11 of the Salary Ordinance “Elected Officials.”
 - b. Employees in the Sworn Unions of:
 - i. Milwaukee Police Supervisors Organization (MPSO).
 - ii. Milwaukee Police Association (MPA).
 - iii. Milwaukee Professional Firefighters Association (Local 215).
 - c. Fields in HCM to help identify ineligibility aside from criteria in 4a & 4b above:
 - i. Regular/Temporary = Temporary.
 - ii. Benefits Service Date = Less than 5 years as of the eligibility date of March 4, 2023.
 - 1. **BSD would be a date of 3/5/18 or more recent.**
5. Effective Date vs. Eligibility Date:
- a. Longevity is effective PP 5, 2023.
 - i. HCM Effective Date = 2/19/23.
 - b. Eligibility will be reached at the end of PP 5, 2023. Anyone who reaches 5 years of service as reflected in their BSD as of the end of PP 5, 2023, or 3/4/23 will be eligible as long as they meet the criteria of eligibility.
 - i. Eligibility Date = 3/4/23, 5 years of service or more on the employee’s BSD in HCM
6. What if my employee separates from city service during PP 5, 2023?
- a. If an employee would have been otherwise eligible, and would have reached 5 years of service based on their BSD in HCM as of the eligibility date of 3/4/23, the employee would be eligible for longevity pay as long as they are paid at least 1 day in PP 5, 2023.
 - b. However, the employee’s paid last day on payroll should still be in accordance with Salary Ordinance and Chapter 350 guidelines for last day at work, and last day on payroll guidelines.
7. What if my employee is on an unpaid status (HCM LOA/Layoff/Suspension or unpaid long term FMLA in City Time) and appears to have at least 5 years of service as of the eligibility date of 3/4/23, does this employee get longevity if they were otherwise eligible?
- a. Departments should add the longevity row in HCM if the employee appears eligible. However, when the employee returns from the unpaid status and the BSD is updated, should the employee become ineligible due to the BSD update, payroll staff must delete the Longevity row(s) in HCM on all applicable records.
 - i. If you find yourself in this situation, email derpayservices@milwaukee.gov for confirmation prior to removing the longevity row.

- ii. If agreed the longevity row is to be deleted, add a general comment that the employee lost eligibility for this year due to adjusted BSD upon return from unpaid status.
 - b. Employee may become eligible the following year if the longevity program comes around again for newly eligible employees.
 - c. It will be ok to remove the row in HCM for longevity because the employee would have been unpaid by the city, no money should be owed back.
- 8. You will run the public query listed below to obtain a list of employees in your department and their BSDs. This is simply a roster with a BSD of your current staff. It does not exclude anyone. You will have to find eligibility based on the data provided in this document.
 - a. Run Public Query: **Y_DER_SERVICEDATE_ROSTER**
 - i. **DO NOT MODIFY THE PUBLIC QUERY!!**
 - ii. Navigate to query manager: Main Menu – Reporting Tools – Query – Query Manager
 - iii. In the “Search By” box, type: Y_DER_SERVICEDATE_ROSTER
 - iv. Under the “Run to Excel” column heading, click the Excel hyperlink. This will open it directly in Excel.
 - 1. Depending on your browser, you may need to take additional steps to open in Excel.
 - 2. You may also click edit, and run, if that is what you are used to.
 - v. Save this list and use it to review for longevity eligibility.
- 9. Please provide DER Pay Services (derpayservices@milwaukee.gov) with a copy of your query and who you have deemed eligible vs ineligible. This should be submitted to Pay Services **no later than the** close of PP 5, 2023.
 - a. Email subject line: **Longevity Eligibility List PP5 2023 & “your department name”**
 - b. Departments will be required to prepare their own longevity eligible list as it will be more accurate than a list from DER.**
- 10. If a new secondary job record is created after the effective pay period for an eligible employee in the future, be sure to add the longevity footnote pay (FOTPCT) to that record upon creation.
- 11. How to enter longevity pay in HCM:
 - a. Navigate to job data: Main Menu – Workforce Administration – Job Information – Job Data
 - b. Search for your employee by name or ID#
 - c. Longevity entries should go on all eligible employee’s records (both primary and secondary) with a payroll status of Active, Leave, or Leave with Pay.
 - i. If the employee’s primary record is suspended at time of longevity, add it to the record. This would be because the employee is suspended from work.
 - ii. If 11.c.i is applicable and the employee has secondary records that are used but suspended due to the employee being on suspension, add longevity to them at the time it is effective.

Favorites ▾ Main Menu ▾ > Workforce Administration ▾ > Job Information ▾ > Job Data

< Action Reasons Home 🔍 🚩

New Window | Help | Person

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Employee [Redacted] Empl ID [Redacted]
Empl Record 0

Work Location Details ? 1 of 1

*Effective Date 01/08/2023 Go To Row + -

Effective Sequence 0 *Action Pay Rate Change ▾

HR Status Active Reason Ordinal Salary Change ▾

Payroll Status Active *Job Indicator Primary Job ▾

d. How to enter longevity on a record with no existing footnote rows (FOTBIW, FOTHR, FOTPCT):

- i. Verify the employee is eligible
- ii. Insert a new row in job data on the Work Location tab
 1. Effective Date = 1st Sunday of PP5 2023 or 2/19/2023
 2. Action = Pay Rate Change
 3. Reason = Longevity

Favorites ▾ Main Menu ▾ > Workforce Administration ▾ > Job Information ▾ > Job Data

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New Window | Help | Pe

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Employee [Redacted] Empl Record 0

Work Location Details ? 1 of 2

*Effective Date 02/19/2023 Go To Row + -

Effective Sequence 0 *Action Pay Rate Change ▾

HR Status Active Reason LONGEVITY ▾

Payroll Status Active *Job Indicator Primary Job ▾

Calculate Status and Dates

- iii. Click on the Compensation tab
 1. On the bottom of the page in the Pay Components section, click the plus symbol on the lower right side to add a new Rate Code row:

Pay Components ?

Amounts Controls Changes Conversion

*Rate Code	Seq	Comp Rate^	Currency	Frequency	Percent^	Rate Code Group^		
1 COMBIW	0	2,187.610000	USD	B			+	-
2	0						+	-

Calculate Compensation

2. Once you have created a new rate code row, add in the longevity data as follows in only the fields listed below:
 - a. Rate Code Group: FOTPCT
 - b. Percent: 1.0
 - c. Tab out of each field
 - d. Click "Calculate Compensation"
 - e. Click Save
3. Check the math:
 - a. Base rate (COMBIW) x longevity (FOTPCT)
 - i. Ex. $2,187.61 \times 1.01 = 2,209.486100$

Home

Work Location Job Information Job Labor Payroll Salary Plan Compensation

Employee [redacted] Empl ID [redacted] Empl Record 0

Compensation Details

Effective Date 02/19/2023
 Effective Sequence 0
 HR Status Active
 Payroll Status Active

Action Pay Rate Change
 Reason LONGEVITY
 Job Indicator Primary Job

Compensation Rate 2,209.486100 *Frequency B Biweekly

Comparative Information

Pay Rates

Default Pay Components

Pay Components ?

Amounts Controls Changes Conversion

*Rate Code	Seq	Comp Rate^	Currency	Frequency	Percent^	Rate Code Group^		
1 COMBIW	0	2,187.610000	USD	B			+	-
2 FOTPCT	0	21,876.1000	USD	B	1.000		+	-

Calculate Compensation

Job Data Employment Data Earnings Distribution Benefits Program Participation

Save Return to Search Notify Refresh Update/Display Include History Correct History

- e. This next section will cover how to enter longevity if the employee already has existing footnotes (FOTBIW, FOTHR, FOTPCT) on the compensation page of the employee's record you are working on.

- i. The bottom of your compensation tab may already have multiple footnotes listed under the Rate Code section, for example:

Pay Components ?

☰ 🔍

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Amounts Controls Changes Conversion

	*Rate Code	Seq	Comp Rate [^]	Currency	Frequency	Percent [^]	Rate Code Group [^]		
1	FOTBIW 🔍	0	57.470000	USD 🔍	B 🔍			+	-
2	COMBIW 🔍	0	1,897.180000	USD 🔍	B 🔍			+	-
3	FOTPCT 🔍	0	93.823200	USD 🔍	B 🔍	4.800		+	-

Calculate Compensation

- ii. With a new development launched in PeopleSoft HCM in PP4 2023, we are now able to have multiple footnote percent (FOTPCT) rows in the Pay Components section on the compensation tab. In order to use this area correctly, the order of the “rate codes” entered in this section is important:
 1. List all “whole rates” first. COMBIW, FOTBIW, and FOTHR as applicable. FOTPCT must be the last row(s) listed in the pay components section. The employee can have more than one FOTPCT on a record and they do not have to be in a particular order for calculation purposes; however, the key is the FOTPCT or percent footnotes must be the last rate code rows listed in the pay components section.
- f. Sample on how to enter longevity on a record with existing footnote rows:
 - i. Verify the employee is eligible
 1. If the employee was eligible on their primary record, all payroll status of active records should be updated.
 - ii. Insert a new row in job data on the work location tab
 1. Effective Date = 1st Sunday of PP5 2023 or 2/19/2023
 2. Action = Pay Rate Change
 3. Reason = Longevity

Favorites ▾ Main Menu ▾ Workforce Administration ▾ Job Information ▾ Job Data

Home

Work Location Job Information Job Labor Payroll Salary Plan Compensation

Employee [REDACTED] Empl Record 0

Work Location Details ?

*Effective Date 02/19/2023

Effective Sequence 0

HR Status Active

Payroll Status Active

*Action Pay Rate Change

Reason LONGEVITY

*Job Indicator Primary Job

Go To Row + -

Calculate Status and Dates

iii. Click on the Compensation tab

1. On the bottom of the page in the pay components section, click the plus symbol on the lower right side to add a new rate code row:

Pay Components ?

*Rate Code	Seq	Comp Rate [▲]	Currency	Frequency	Percent [▲]	Rate Code Group [▲]		
1 FOTBIW	0	57.470000	USD	B			+	-
2 COMBIW	0	1,897.180000	USD	B			+	-
3 FOTPCT	0	93.823200	USD	B	4.800		+	-
4	0						+	-

2. Once you have created a new rate code row, add in the longevity data as follows in only the fields listed below:

- a. Rate Code Group: FOTPCT
- b. Percent: 1.0
- c. Tab out of each field
- d. Click "Calculate Compensation"
- e. Click Save

3. Check the math:

- a. Base Rate (COMBIW) + Hourly and Biweekly Footnotes as applicable (FOTBIW &/or FORHR) X Any/All FOTPCT's individually
- b. Ex on a calculator= $1,897.18 + 57.47 \times 1.048 \times 1.01 = 2,068.957932$

Employee [Redacted] Emp [Redacted]

Compensation Details 1 of 3

Effective Date 02/19/2023
 Effective Sequence 0
 HR Status Active
 Payroll Status Active
 Action Pay Rate Change
 Reason LONGEVITY
 Job Indicator Secondary Job
 Go To Row
 Future

Compensation Rate 2,068.957932 *Frequency B Biweekly

Comparative Information

Pay Rates

Default Pay Components

Pay Components

*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent	Rate Code Group
1 FOTBIW	0	57.470000	USD	B		
2 COMBIW	0	1,897.180000	USD	B		
3 FOTPCT	0	93.823200	USD	B	4.800	
4 FOTPCT	1	20.484732	USD	B	1.000	

Calculate Compensation

- g. Do not combine footnotes.
 - i. If your employee has existing footnotes on the compensation tab in the pay components section, add new rows for each footnote for the purpose they serve. Keep each unique footnote separate for tracking purposes. No footnotes should ever be combined.
- h. What about maintaining longevity in the future?
 - i. If an employee has earned longevity and you create a new secondary record for them, re-activate a record, or create a new primary record, be sure to add the longevity FOTPCT upon creation of the row.
 - ii. Document this in general comments to help keep track of these newly created records and what the 1% is used for, since it will be updated after the longevity rows are entered in PP 5, 2023.
- i. What if an employee who was previously in an ineligible title moves to an eligible title during the year?
 - i. This would apply to employees who are benefit eligible, and accruing service credit. Currently this should only apply to sworn unionized employees (MPA, MPSO, and Local 215). They would become eligible for longevity should the program return the following year in PP5, payroll staff should then add longevity pay to the employees record at that time.
- j. What if an employee who has longevity pay transfers to an ineligible title?
 - i. The longevity pay (FOTPCT) should be removed at time of new appointment.

- ii. An example of this would be an employee being transferred to the Police Department and becoming a Police Officer who was previously a City Laborer.
- k. What if an employee is rehired during the year and is able to retain service credit that allows them to become longevity eligible?
 - i. Longevity FOTPCT adjustments are entered in to HCM once per year. If employees are rehired and become eligible for longevity based on this example, they should be kept track of and longevity would be granted and added to their record by their employing department the following year in PP 5 should the longevity program continue.