Retirement Projection

Instructions for Using the Database

1. Go to the OA website and click on the *Retirement Projection Tool database* to download the application to your desktop.

2. Once the download process is completed, open the application by selecting the icon located on your desktop.

3. Before the tool opens, you will be prompted to enter your Oracle User Name and Password and click OK.

Choose Pers Area or Org Range

The report can be run by selecting a Personnel Area from the drop down or for a specific org range by selecting the "open form" icon.

If you select the "Open Form" icon, enter the org name in the first column, followed by the starting and ending org codes. Enter as many org names and corresponding org code ranges as you would like. Org Codes must be 8 digits (Ex. 00811000).

To delete an Org Range, select the "Delete" icon beside the row.

Select the "Return to Retirement Eligibility Tool" to return to the main form.
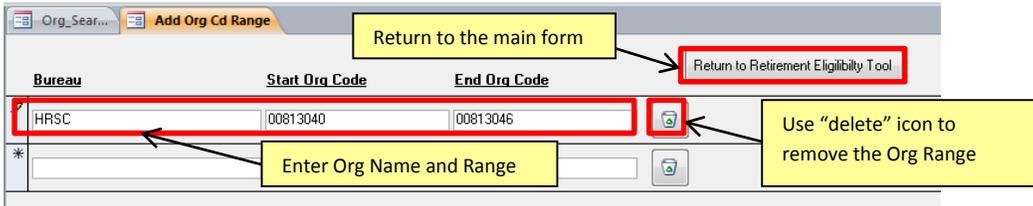
Additional Search Criteria

Race Codes: All race codes are selected by default. To exclude a Race Code(s) from the report, click on the line and it will deselect the record (it will appear white if not selected)

Gender Codes: All gender codes selected by default. To exclude a Gender Code(s), click on the specific line and it will deselect the record (it will appear white if not selected).

Job Code: Enter the job code to search for a single job classification. To search multiple job codes within the same search, enter only the first few common digits. For example, for HR Analyst 3 (Generalist), enter 0503A, or for all HR Analyst 3s, enter 0503.

Adv. Filter: Drop down list of IRIS fields available for additional reporting. The filter can be used as =, >, <, starts with, ends with, and contains. Example is an Adv. Filter of HDQ_CTY (Headquarter County) = 022, will limit the reports to only retirement eligibility within Dauphin County. An Adv. Filter of Age > 70 will produce the report to only employees that are eligible to retire and have an age greater than 70.

By selecting the "delete" icon next to the Adv. Filter, all additional search criteria is removed and set back to the default.

Reports

Yearly Reports – Generates the report of all employees who will become eligible in the indicated time period (i.e., "Current Eligible", "Eligible Within 1 Year", "Eligible Within 2 Years", etc.). Select the appropriate icon to either view or export the results.

Summary Report – Generates a report by job title of the number of employees who will become eligible in the next four years.   Select the appropriate icon to either view or export the results.

Agency Summary Report – Generates a report by agency or org range of the number of employees who will become eligible in the next four years. Select the appropriate icon to either view or export the results.

4 Year Eligibility Report – Generates a summary report of all employees who will become eligible in the next four years.

Below are the icons and description available for report.

Previews the report and allows the report to be printed. The report is not saved when selecting this icon.

Exports and saves the report as a PDF document to your desktop.

Exports and saves the report as an Excel spreadsheet to your desktop