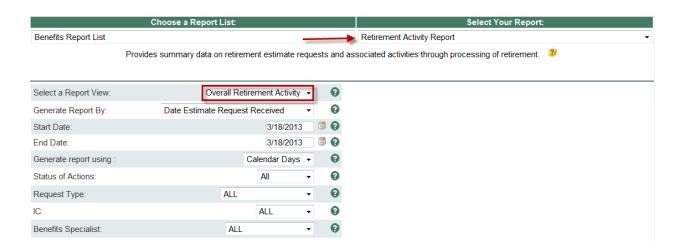# Understanding the Retirement Activity Report Views

The **Retirement Activity Repor**t facilitates the BPLB's Retirement Estimate and Processing activities by allowing the BPLB to obtain and present data in a manner that quickly identifies outstanding retirement estimate requests and processing activities. The report offers four views: *Overall Retirement Activity, Estimates Received, Estimates Not Sent to Employees*, and *Retirements Processed.*

Overall Retirement Activity

Report Parameters

Generate Report By: Indicate whether you would like your report data filtered by the date the estimate request was received, the date the retirement application was received, the date the retirement estimate was completed, the date the retirement was effective, or the date the action was sent to payroll

Start/End Date: Enter the date range for which you would like the report generated based on your selection above

Generate Report Using: Indicate if you would like your report's metrics to be calculated using Calendar days or Working days. Working Days excludes weekends and Federal holidays.

Status of Actions: Indicate whether you would like to see active actions, completed actions or all actions.

Request Type: Select a specific request type, or all request types.

IC: Select a specific Institute or Center you wish to view, or select 'All.'

Benefits Specialist: Indicate whether you would like to view actions for a specific Benefits Specialist, or actions handled by all Benefits Specialists.

After you have selected your report parameters, click the 'Generate Report' button to retrieve your report.

Report View

The *Overall Retirement Activity* view displays general information such as the number of retirement estimates and applications that BPLB received, that are completed, or are in progress, as well as the average number of days to completion. The report also gives you two options to "drill-down" to see the details of the actions included in the report.

➢ The IC names are hyperlinks – you can click on the IC to "drill down" for a detailed view:

IC	Total Estimate Requests Received	Total Estimate Requests Completed	Average # Days to Complete Estimate	Total # Estimate Requests in Progress	Total # Retirement Applications Received	Total # Retirement Applications Completed	Average # Days to Process Retirement	Total # Retirement Applications in Progress
CC	46	38	9	8	6	4	3	2
CIT	6	4	-20	2	2	2	5	0
CSR	7	7	3	0	1	1	0	0
NCATS	6	6	15	0	0	0	0	0
NCCAM	1	1	17	0	0	0	0	0
NCI	39	38	2	1	6	1	0	5
NCI - OD (only)	9	6	5	3	2	1	4	1
NEI	10	7	7	3	1	1	1	0

IC: CC

Run Date: 9/24/2012 3:21:42 PM   Status: ALL   Actions with Estimate Request Received between 7/1/2012 to 9/24/2012 using Calendar days

Trans #	Retirement System & Request Type	Date Estimate Request Received	Projected Retirement Date(s) for Estimate Req	Date Estimate Request Completed	# Days To Complete Estimate	Pending Decision Expiration Date (1 Year)	Date Retirement Application Received	Date Sent to Payroll (Processing Completed)	# Days to Process Retirement	Retirement Effective Date (Proposed)	Retirement Counseling Dates
*Denotes active actions											
536276*	Optional	07/05/12	12/31/15 12/31/17 12/31/21	08/09/12	35	08/09/13					
536628*	Optional	07/08/12	01/09/13 01/09/14	07/17/12	9	07/17/13					
537225*	Optional	07/11/12	01/15/15 06/15/15 01/15/16	07/17/12	6	07/17/13					
537366*	Optional	07/11/12	12/31/12	07/31/12	20	07/31/13					
537460*	Optional	07/12/12	08/01/12 12/12/14 12/12/19	08/13/12	32	08/13/13					
537640*	I don't know	07/12/12	07/01/15 07/01/18 07/01/21	07/23/12	11	07/23/13					
537876*	FERS-Optional	07/13/12	05/18/13 07/12/13 12/29/13	08/02/12	20	08/02/13	09/18/12			01/13/13	

The asterisk (*) to the right of the WiTS action denotes that the action is active.

- ➤ The Total hyperlink will direct you to a more detailed view of all the records than the individual IC hyperlinks:

IC	Total Estimate Requests Received	Total Estimate Requests Completed	Average Number of Days to Complete Estimate	Total Number of Estimate Requests in Progress	Total Number of Retirement Applications Received	Total Number of Retirement Applications Completed	Average Number of Days to Process Retirement	Total Number of Retirement Applications in Progress
OD - ORF	52	47	26	5	11	11	12	0
OD - ORS	87	81	21	6	24	23	9	1
Total	1639	1452		187	264	236		30
Average			19				4	

- The comments section displays the contents of the Comment feature in the toolbar of the Retirement action. It displays the name of the individual, the date and time the comment was entered, along with the actual comment.
- The workflow emails section display the name of the automated email and the date/time it was sent (if applicable).
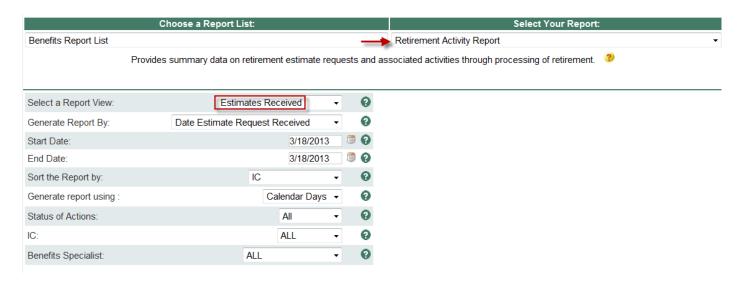
Retirement Activity Report

Run Date: 11/3/2014 1:13:48 PM   Status: All   Actions with Retirement Estimate Completed between 10/25/2014 to 11/3/2014 using Calendar days

WiTS#	Institute	Employee Name	Benefits Specialist	Retirement System & Request Type	Date Estimate Request Received	Projected Retirement Date(s) for Estimate Req	Date Estimate Request Completed	Days To Complete Estimate	Pending Decision Expiration Date (9-mo)	Date Retirement Application Received	Date Final Estimate Started	Date Final Estimate Completed	Days to Complete Final Estimate	Date Sent to Payroll (Processing Completed)	Days to Process Retirement	Retirement Effective Date (Proposed)

* Denotes active actions

| 694823* | NCX | JONES, TIM | DAVIS, NANCY | FERS-Optional | 10/28/14 | 09/23/14 | 10/28/14 | 0 | 10/28/15 | | | | | | | |

   Comments: (Nancy Davis 10/27/2014 4:30PM Running calculations for estimate)

   Workflow Emails: Receipt of Retirement Estimate Request: --; Request For Additional Information: --; Retirement Estimate Attached: --; Retirement Estimate Mailed: 10/28/2014 4:18PM; Retirement Estimate Request Cancelled: --;

| 675267* | NCX | JONES, BRUCE | DAVIS, NANCY | FERS-Optional | 10/28/14 | 09/23/14 | 10/28/14 | 0 | 10/28/15 | | | | | | | |

   Comments: (Nancy Davis 10/27/2014 4:30PM Running calculations for estimate)

   Workflow Emails: Receipt of Retirement Estimate Request: --; Request For Additional Information: --; Retirement Estimate Attached: --; Retirement Estimate Mailed: 10/28/2014 4:18PM; Retirement Estimate Request Cancelled: --;

| 676716* | NCX | JONES, SALLY | DAVIS, NANCY | FERS-Optional | 10/28/14 | 01/01/18 01/01/19 01/01/20 | 10/28/14 | 0 | 10/28/15 | | | | | | | |

   Comments: (Nancy Davis 10/27/2014 4:30PM Running calculations for estimate)

   Workflow Emails: Receipt of Retirement Estimate Request: --; Request For Additional Information: --; Retirement Estimate Attached: --; Retirement Estimate Mailed: 10/28/2014 4:18PM; Retirement Estimate Request Cancelled: --;

| 690155* | NCX | JONES, SALLY | DAVIS, NANCY | FERS-Optional | 10/28/14 | 01/01/18 01/01/19 01/01/20 | 10/28/14 | 0 | 10/28/15 | NCX | | | | | | |

   Comments:

   Workflow Emails: Receipt of Retirement Estimate Request: --; Request For Additional Information: --; Retirement Estimate Attached: 10/30/2014 10:16AM; Retirement Estimate Mailed: --; Retirement Estimate Request Cancelled: --;

The asterisk (*) to the right of the WiTS action denotes that the action is active.

Estimates Received

Report Parameters

Unlike the Overall Retirement Activity view, this report view allows you to sort by IC or Benefits Specialist.

In addition to the filter options available in the Overall Retirement Activity view, you can choose to filter this report view by the date the estimate request was received or the date the retirement estimate was completed.

After you have selected your report parameters, click the 'Generate Report' button to retrieve your report.

Report View

The *Estimates Received* view displays specific information about retirement estimate requests received by the BPLB such as date(s) of pre-retirement counseling, the type of request (retirement system), and the employee's proposed retirement dates (up to 3 dates).
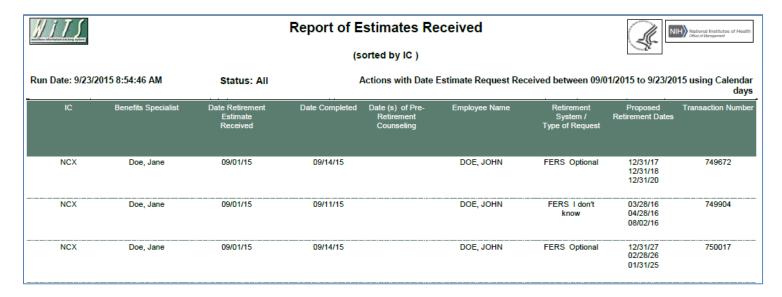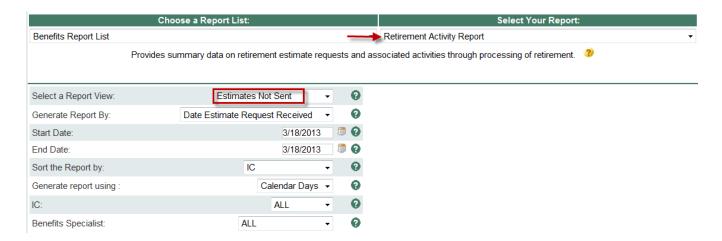
Estimates Not Sent

Report Parameters

Unlike the Overall Retirement Activity view, this report view allows you to sort by IC or Benefits Specialist.

In addition to the filter options available in the Overall Retirement Activity view, you can choose to filter this report view by either the date the estimate request was received or the earliest proposed retirement date.

After you have selected your report parameters, click the 'Generate Report' button to retrieve your report.

Report View

The *Estimates Not Sent* view displays specific information about retirement estimate requests received that the BPLB has not sent to an employee.

Note: Only retirements that are "active" will be displayed.

The last page of the report displays a summary table of the number of active retirement estimates and the average number of calendar days they have been active.

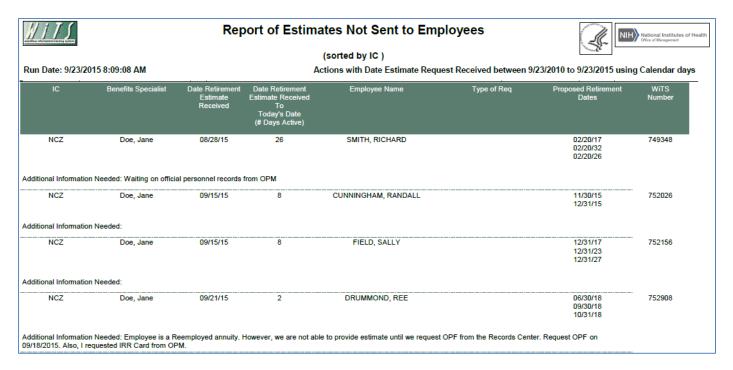|	Benefits Specialist Active Retirement Estimate Summary Chart	
Benefits Specialist	Number of Active Retirement Estimates	Average Number of Days Active
Doe, Jane	14	14.36
Doe, Jane	8	12.25
Doe, Jane	8	16.38
Doe, Jane	5	18.60
Doe, Jane	9	12.78
Doe, Jane	2	13.00
Doe, Jane	3	9.67
Doe, Jane	6	8.83
Doe, Jane	6	24.00
Doe, Jane	1	14.00
Total	62	14.58

Retirements Processed

Report Parameters

Unlike the Overall Retirement Activity view, this report view allows you to sort by IC or Benefits Specialist.

In addition to the filter options available in the Overall Retirement Activity view, you can choose to filter this report view by either the date the retirement application was received, the date the retirement was effective, the date the action was sent to payroll or the date the action was processed in Capital HR.

After you have selected your report parameters, click the 'Generate Report' button to retrieve your report.

Report View

The Retirements Processed view displays specific information about retirement actions processed by the BPLB such as the effective date of the retirement, the date sent to payroll and the date "Pro'd" in Capital HR.

 Note: Only retirements that are "completed" will be displayed.

About Metrics in the Overall Retirement Activity Report

Metrics are calculated and displayed only on the Overall Retirement Activity view. Each metric represents a count of the number of the number of days (working or calendar) that have elapsed between certain dates in the retirement estimate and processing processes.

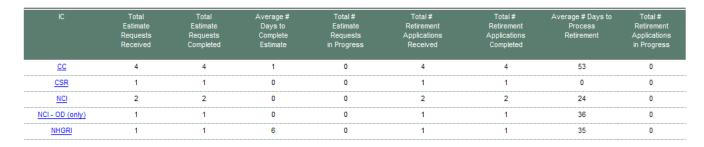The column headers display the average days for each metric for all actions contained in the report:

IC	Total Estimate Requests Received	Total Estimate Requests Completed	Average # Days to Complete Estimate	Total # Estimate Requests in Progress	Total # Retirement Applications Received	Total # Retirement Applications Completed	Average # Days to Process Retirement	Total # Retirement Applications in Progress
CC	4	4	1	0	4	4	53	0
CSR	1	1	0	0	1	1	0	0
NCI	2	2	0	0	2	2	24	0
NCI - OD (only)	1	1	0	0	1	1	36	0
NHGRI	1	1	6	0	1	1	35	0

The drill down views display the details of the number of days for each action contained in the report:

IC: CC

Run Date: 9/24/2012 3:26:38 PM   Status: ALL   Actions with Date Sent to Payroll between 8/1/2012 to 9/24/2012 using Calendar days

Trans #	Retirement System & Request Type	Date Estimate Request Received	Projected Retirement Date(s) for Estimate Req	Date Estimate Request Completed	# Days To Complete Estimate	Pending Decision Expiration Date (1 Year)	Date Retirement Application Received	Date Sent to Payroll (Processing Completed)	# Days to Process Retirement	Retirement Effective Date (Proposed)	Retirement Counseling Dates
*Denotes active actions											
527898	Optional	05/01/12	08/31/12	05/01/12	0	05/01/13	05/30/12	08/03/12	65	08/31/12	
538022	Optional	07/16/12	07/31/12	07/20/12	4	07/20/13	07/26/12	09/20/12	56	08/31/12	7/11/2012
539672	Optional	07/24/12	08/31/12	07/24/12	0	07/24/13	06/12/12	08/03/12	52	08/31/12	
539677	Optional	07/24/12	08/31/12	07/24/12	0	07/24/13	06/27/12	08/03/12	37	08/31/12	

Metric Definitions:

- *# of Days to Complete Estimate*
  This metric is a count of the number of days elapsed from the date the estimate request was received by BPLB to the date the estimate request was completed.
- *# of Days to Process Retirement*
  This metric is a count of the number of days elapsed from the date the retirement application was received to the date the package was sent to payroll (processing completed).

In addition, a Summary Metrics table is available at the end of the report:

Total # of Retirement Applications Received	Total # of Retirement Applications Completed
5	5

	Employee Estimate Requests Completed			
	Earliest Projected Retirement Date Requested <= 1 yr	Earliest Projected Retirement Date Requested > 1yr <= 3 Yrs	Earliest Projected Retirement Date Requested > 3 yrs	# of Days to Process Retirement
# Days				
Average	14	0	0	53
Median	35	0	0	55
Minimum	0			37
Maximum	66			65
NIH / OHR SLA STANDARD	15	20	35	
ACTION COUNT				
# of Completed Retirement Estimate Requests	5			

Exporting and Printing

All three views can be printed and/or exported to Excel, PDF or Word by clicking on the icon on the toolbar: