1170.10 Date Definitions

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Personal Information

Navigation: Workforce Administration > Personal Information > Modify a Person

NOTE: Information on the Personal Data panels is arranged by section or group box. Each of these group boxes can use different effective dates. They are not related.

Biographical Details

Primary Name:

- Effective Date – Displays effective date of current name.

Biographical Information:

- Date of Birth – employee’s date of birth. Required field. Record cannot be saved if blank.
- Date of Death – system populates when Action/Reason of Termination/Death of Employee is used.

Biographical History:

- Effective Date – Effective date for changes in this section/group box. Also date carried to Job Data for new hires.
- Marital Status As of – date of change in status. (May be hire date for new hires)

Contact Information

- Address Type - As Of Date- Effective date of the current address. System displays date entered on Address History Panel.
- Address History Effective Date – Manually entered effective date of address being added or updated. Date displays on Current Addresses Section of Contact Information Panel

Regional Panel

- Effective Date – Date in Section 2 of Form I-9 when a representative has signed the form.
- Date Entitled to Medicare – Not Used.
- Smoker History: Smoker As of Date - Not Used.
Position Management

Description

- Effective Date – Enter the effective date of the new position into the Effective Date field.

![Note]

The effective date of the position must be on or earlier than the effective date of the employee's record in job data. Displays effective date of current name.

Contract Data

- Contract Begin Date - Enter the desired information into the Contract Begin Date field
- Expected End Date - Enter the desired information into the Expected End Date field.
- Maximum End Date - Enter the desired information into the Maximum End Date field.

![Note]

Contract Data is maintained for employees who have contracts or funding for a specified length of time

Job Information

Navigation: Workforce Administration > Job Information > Job Data

![Note]

Many date fields are hidden and only display on the panel for related actions. Example: Expected Return Date is only displayed when the employee is on leave.

Work Location

- Effective Date – Date is system generated when row is entered. Can be manually edited. This is the first day of status entered. For example, if effective date of retirement is 9/1, this is the first day of retirement status with last day worked as 8/31.
- Last Start Date – System generated date. Most recent start date (Rerhire date) for this Employee Record.
- Termination Date – System displays day before the termination effective date. This field is cleared if the employee is rehired.
- Expected Job End Date – Manually updated field. Warning when saving an Effective Dated row beyond this date. Monitor field by running the Planned Exit Report. Expected End Date is entered for:
  - End of Temporary positions
  - End of Fixed Length Appointments
  - End of semester for student jobs
  - End of Graduate Assistantships
  - End of term appointment (management group employees (deans, VP), or chairs/directors who are appointed for a term and then may be reappointed after review)
  - End of Employment Contracts (athletic coaches, presidents, etc)
  - Non-tenure tenure track (must be reappointed each year)
  - Beginning of short work breaks

![Note]

Encumbrances ARE impacted and will stop as of the date entered.

- Last Date Worked – System generated date displays the day before the termination effective date when Termination action is entered. Field is cleared when employee is rehired or returns from leave. Check Override Last Date Worked to enter correct date.
  - A benefits-eligible employee will have benefits coverage through the end of the month in which they last worked; applicable premiums for this coverage will be deducted from final check. An example would be if the effective date of retirement is 9/1, then last day worked is 8/31 with benefits coverage through 8/31. Another example would be if the effective date of termination is 9/15, the last day worked is 9/14 with benefits coverage through 9/30.
- Expected Return Date – Opens for when Leave of Absence action is used. Used for reporting purposes and triggers Benefits Billing for extended unpaid leaves.
• Position Entry Date – System generated field as of date employee entered the current position. Changes to effective date of row entered if position number is changed. Opens for editing when Override Position Data button is on.
• Department Entry Date – Date employee was first assigned to this department. System generated. Defaults from Position Data table. Opens for editing when Override Position Data button is on.
• Date Created – Displays the date on which the current row was entered.

Job Information

• Entry Date – Date that employee was first assigned this job code. System generated when a row is added and the job code is changed. Opens for editing when Override Position Data button on Work Location Panel is clicked on. NOTE: Some titles may change, but the corresponding job code does not change (i.e. 5900 or 7900 job codes). In these cases, the Entry Date field should be manually updated to reflect the correct date.

Note

Job entry date is used for scheduling performance reviews, step movement within the COLT unit, and AI step increases for nonrepresented employees.

Job Labor

• Labor Agreement Entry Date – Not used.
• Union Seniority Date – Manually updated field for tracking seniority dates for employees in collective bargaining units that maintain these dates.

Note

• Employees who return to their position within 24 months of being laid off will retain the seniority they had when they left.
• Employees on approved leaves (paid or unpaid) retain their seniority including time spent on leave to serve in a union officer position.
• Employees in COLT and Service and Maintenance technically do not have seniority for the first six months of employment after which time it is retroactively restored.
• There is no specified provision in the Service and Maintenance contract for calculating seniority for part-time employees or those with dual assignments. Any actions with seniority impact in those areas may want to consider part-time employees who will not appear on the seniority list.
• Transfers from another campus’ regular position:
  □ Never resets seniority for nonrepresented employees
  □ Always resets seniority for COLT employees
  □ Resets seniority for Police only if coming from a non-Police position
  □ Resets classification seniority for Service & Maintenance:
    ■ if title or job grouping changes;
    ■ or, if coming from a part-time position.
  □ Always resets campus seniority for Service & Maintenance

<table>
<thead>
<tr>
<th>Union</th>
<th>Contract Language</th>
<th>MaineStreet Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service and Maintenance</td>
<td>Classification</td>
<td>Union Seniority Date</td>
<td>Full-time regular service in current job classification or job grouping on current campus. Trades (Electricians, Mechanic) are grouped, nontrades are not (Custodians, Culinary Associates). Check the contract if an employee is promoted.</td>
</tr>
<tr>
<td>Article 15</td>
<td>Seniority</td>
<td></td>
<td>Start of continuous full-time regular service, regardless of classification, at a specific campus.</td>
</tr>
<tr>
<td>College</td>
<td>Campus</td>
<td>Company Seniority Date</td>
<td></td>
</tr>
<tr>
<td>University Seniority</td>
<td>Benefits Service Date*</td>
<td></td>
<td>Start of continuous full-time regular service for the University of Maine System.</td>
</tr>
<tr>
<td>COLT (ACSUM) Article 22</td>
<td>Seniority</td>
<td>Union Seniority Date</td>
<td>Based on the start of regular service at current campus. This includes any service for other unions, so it most cases it will be the same as the regular service date – unless they transferred from another campus.</td>
</tr>
<tr>
<td>Police Article 12</td>
<td>Seniority</td>
<td>Union Seniority Date</td>
<td>Based on the start of regular service in a position covered by the police unit. This would normally be the same as the regular service date, unless they transfer into the unit from another union or non-represented position.</td>
</tr>
<tr>
<td>NonRepresented Confidential and Supervisors “Seniority” Section</td>
<td>Seniority</td>
<td>Benefits Service Date</td>
<td>Start of regular service for the University System.</td>
</tr>
</tbody>
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*Because this is not possible to record in cases when an employee started as a part-time regular employee, we will maintain the Benefits Service Date as the start of regular employment. Changing the BSD would have a negative effect on their benefits.

Labor Facility Entry Date – Not used.
Salary Plan

- Grade Entry Date – Date when employee was placed in this Salary Grade. System displays effective date of added row when Grade is changed. Date may be manually updated.
- Step Entry Date – Date employee was placed in this Salary Step. System displays effective date of added row when Step is changed. Date may be manually updated.

Employment Information

**Note**

The Employment Information panel has many dates, but few are used. Most of the dates are system generated and related to assignments. In our system, we do not use assignments. Instead we create an employee record for each job held by an employee.

- Original Start Date – Original Hire date as a UMS Employee (student, hourly, or salaried). Do not Change.
- Last Start Date - System generated date. Most recent start date (Rehire date) for the Employee Record.
- First Start Date- System generated date. First start date for the Employee Record.
- Termination Date - System displays day before the termination effective date. This field is cleared if the employee is rehired.
- Org Instance Service Date – System generated but may be overridden as appropriate. Used for tracking the true hire date when the Job must be set up using a different hire date. For example, Faculty and/or grad assistants may have job set up effective 9/1 to ensure full pay for month of September, however the true start date might be 9/2, 9/3 or 9/4 which is what is overridden as the Org Instance Service Date. The OISD drives the deadlines on the Onboarding Activity Guide.
- Last Assignment Start Date – System generated. Not Used
- Assignment Start Date – System generated. Not Used
- Assignment End Date – System generated. Not Used
- Company Seniority Date – System generated. Reflects original hire date for any UMS employment. Must be manually updated to reflect Campus Seniority Date for Service & Maintenance employees who transfer to another campus.

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<td>Start of continuous fulltime regular service, regardless of classification, at a specific campus.</td>
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- Benefits Service Date – System generated, but can be manually updated to reflect the earliest date of continuous, regular service. If employee changes from temp to regular, this date should be updated.

**Note**

Benefits uses this date to calculate years of service for benefits eligibility and retirement benefits.

- Seniority Pay Calc Date – Not Used
- Probation Date – Not Used
- Professional Experience Date – Not Used
- Last Verification Date – Not Used
- Appointment End Date – Manually entered optional field. Usage and definition unique to each business unit.

Benefit Program Participation
• ABBR Override Date - Manually entered field. Date ABBR ends. Process will enter job row and set this field to blank on day following date entered. Should always be set for last day of pay period.
• Benefit Program Participation Effective Date – Effective date for benefits enrollment. This date will automatically default; not necessary to change.

Distribution Detail
• Start Date - Enter earnings date this Pay Distribution starts. If this date falls on a day other than the first day of a pay period, the applicable pay will be prorated according to the number of weekdays in the pay period.
• End Date - Enter earnings date this Pay Distribution ends. If this date falls on a day other than the last day of a pay period, the applicable pay will be prorated according to the number of weekdays in the pay period. End Dates are used for soft money funding.

Time Reporter Data
This panel may be accessed by the link on the Employment Data Panel Or by using the following navigation:

Navigation: Time and Labor > Enroll Time Reporters > Create Time Reporter Data (new records) or Maintain Time Reporter Data (edit existing records)
• Effective Date – The effective date must be the same as or after the hire date. Enter the day the time reporter must begin reporting time.

Note
The date must be the effective date of the job record or greater. In most cases, it should be the effective date of the job record.

Employee Next Review Date
Navigation: University of Maine System > HRMS > Employee Review Date Data
NOTE: Employee review date data resides on a separate panel outside of Job Data. Information is effective dated and historical rows are stored indefinitely.
• Effective Date – date of row being added. Default is system generated for current date. Can be changed.
• Next Review Date – the date of the employee’s next review. Manually entered and updated field. Used to generate reports listing upcoming evaluations.

Dependent Information:
Navigation: Workforce Administration > Personal Information > Personal Relationships
NOTE: Information on the Dependent Information panels is arranged by section or group box. Each of these group boxes can use different effective dates. They are not related.

Name
• Effective Date – Displays effective date of current name.

Address
• Effective Date – Displays effective date of current address.

Personal Profile
• Date of Birth – Dependent’s date of birth; used to calculate Spousal Life insurance premiums and eligibility for health and dental plans.
• Date of Death – Date of the dependent’s death
• Medicare Entitled Date – Not used
• Marital Status As of – date of change in status; optional
• Student As of – date of change in status; optional
• Disabled As of – date of change in status; optional
• Smoker As of – date of change in status; optional

BAS Activity
Navigation Main Menu > Benefits > Manage Automated Enrollment > Review BAS Activity
• Event Date – effective date of the change in status or eligibility; (i.e.: date of birth of dependent, date of marriage / divorce; 4 years of service, etc.)
Enroll in Benefits:

Navigation Main Menu > Benefits > Enroll in Benefits > xxxxxxxx

- Coverage Begin Date – effective date of coverage status; this date could be different than the Event Date for benefits that are set up to begin/end the first of the month following the event date.
- Deduction Begin Date – the pay period begin date that contains the Coverage Begin Date.
- Election Date – Date the event was processed / finalized.

Employee Event Detail

Navigation Main Menu > Benefits > Manage Automated Enrollment > Review Processing Results

- Date – effective date of the event
- Addr Effdt – effective date of the address (state or postal code) used for processing this event.
- Job Effdt – effective date of the job row used for processing this event.
- Status Date – date event was created or opened
- Option Notify – date the enrollment statement was printed (Notified status)
- Confirm Notify – date event was confirmed / finalized.