



**Office of  
General Services**

**Business  
Services Center**

# HR User Group

**April 23, 2018**

# Benefits Administration

- Off-boarding Team
- Retirement Online

Christy Chin

Diana Chiachiarretta  
Megan Browe

# Previous State of Offboarding

- Shared Excel Spreadsheet
- Manually filter HCM worklist for Offboarding Cases
- Mail employee's paper packets with paper forms
- Packet 35 – 150 sheets of physical paper (and a CD ROM)
- Work performed by many BSC Benefits Medical Leaves Teams
  - Previously, each medical leave team would handle packets for their agencies, and print out each packet by hand.



## Previous State of Offboarding Packets

- Representatives printed information from the Personal Tab in NYBEAS
  - Completed packets would be stored in the filing cabinets until the employee retired.
- Representatives gathered necessary information from NYBEAS, HCM, LATS, PayServ systems...and they would hand write information on NYBEAS printout
- Representatives completed and printed Retirement Packets (Cover Letter, Checklist, RS-6355 forms, Information for Retirees, Sick Leave Estimate Excel Spreadsheet)
- Packet mailed to address on file
- NYBEAS Personal Tab printout, copy of Sick Leave Estimate, all returned forms stored in file cabinet

# New State of Offboarding

- New Offboarding Team within BSC Benefits
- Shared Access Database (holds all necessary data, manages workflow)
- Cases assigned individually rather than by agency
  - Previously, cases were distributed one by one and not by agency.
- Query runs automatically of HCM worklist for Offboarding Cases (E-mailed as spreadsheet to Offboarding Team)
  - Status is marked in the access database, so that any employee in Benefits can assist the customer with their questions.
- No papers or printing for Retirement Packets!
  - Packets are now electronic and can be sent quickly to customers.
- File Cabinet Eliminated!



File Home Create External Data Database Tools Tell me what you want to do

Views View Paste Copy Format Painter Filter Sort & Filter Ascending Descending Remove Sort Selection Advanced Toggle Filter Refresh All Delete More Records Find Find Go To Select Replace Text Formatting

### All Access Objects

Search...

**Tables**

- tbl\_AgencyList
- tbl\_BSCRepNames
- tbl\_NegotiatingUnit
- tbl\_OffboardingResearch

**Queries**

- qry\_New Case
- qry\_Offboarding\_closed
- qry\_Offboarding\_open
- qry\_Packet Sent
- qry\_Separations
- qry\_To Be Sent

**Forms**

- frm\_1\_New\_Case
- frm\_2\_Separations
- frm\_2\_To\_Be\_Sent\_Retirement
- frm\_3\_Packet\_Sent\_Retirement
- frm\_4\_Offboarding\_Closed

### frm\_1\_New\_Case

#### Input New Offboarding Case:

Last Name	<input type="text"/>	First Name	<input type="text"/>	Middle Initial	<input type="text"/>
Agency	<input type="text"/>	Packet Type	<input type="text"/>	Eff Date of Sep	<input type="text"/>
N#	<input type="text"/>	SS#	<input type="text"/>	Date of Death	<input type="text"/>
Date Notified	<input type="text"/>	Notification Type	<input type="text"/>		
Email	<input type="text"/>				
Comments	<input type="text"/>				

#### Offboarding Team Only:

Assigned To

Offboarding 1 : Database- V:\BusinessServicesCenter\HR\BenefitsAdmin\2018\Offboarding\Offboarding\Offboarding 1.accd (Access 2007 - 2016)

File Home Create External Data Database Tools Tell me what you want to do

View Paste Cut Copy Filter Ascending Descending Selection Advanced Refresh All New Save Totals Spelling Find Replace Go To Select Text Formatting

Sort & Filter Records Find

### All Access Objects

Search...

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- frm\_3\_Packet\_Sent\_Retirement**
- frm\_4\_Offboarding\_Closed

#### Packet Information

Last Name  First Name  Middle Initial

Assigned To  Agency

Eff Date of Sep  Packet Type

Date of Death

#### Employee Information

N#  Email

SS#  Address (Street, City, State, Zip)

Tier

#### NYBEAS Information

Health Insurance Status  Run Out Date

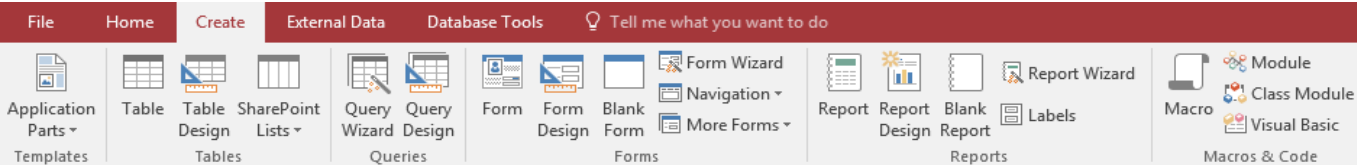
Health Insurance Notes

M/C Life Enrolled ☐

#### Completion Status

Case Complete ☐

Date Complete



## All Access Objects

Search...

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- frm\_4\_Offboarding\_Closed

frm\_1\_New\_Case frm\_2\_Separations frm\_2\_To\_Be\_Sent\_Retirement **frm\_3\_Packet\_Sent\_Retirement**

## Packet Information

Last Name  First Name  Middle Initial

Assigned To  Agency

Eff Date of Sep  Packet Type

Date Notified  Notification Type

## Employee Information

SS#  Email

Date of Birth  Address (Street, City, State, Zip)

NU

N#

Ret Reg #

## NYBEAS Information

Health Insurance Status

Run Out Date

Health Insurance Notes

M/C Life Enrolled ☐

## LATS Information

Hours Per Day

Sick Leave Credits

## Job Data

Comp Rate

Addition Pay

Total Salary

Job Title

Line Item #

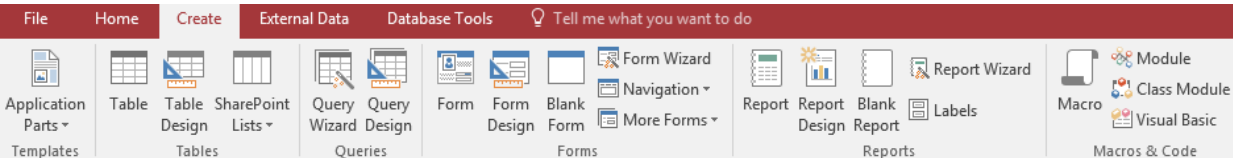
Service Date

Comments

## Packet Sent

Date Packet Sent





## All Access Objects

Search...

## Tables

- tbl\_AgencyList
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## Forms

- frm\_1\_New\_Case
- frm\_2\_Separations
- frm\_2\_To\_Be\_Sent\_Retirement
- frm\_3\_Packet\_Sent\_Retirement
- frm\_4\_Offboarding\_Closed

## Packet Information

Last Name  First Name  Middle Initial   
Assigned To  Agency   
Eff Date  Packet Type  Date Sent

## Employee Information

N#  Email   
NU  Read Receipt for Packet ☐

## Forms

PS-405 Status  PS-406 2 Status   
PS-405 Rec Date  PS-406.2 Rec Date   
Health Ins Status  PS-410 Status   
PS-404 Status  PS-410 Fax to CS ☐  
PS-404 Rec Date  PS-410 Fax Date   
Health Ins Notes

Run Out Date Comments 

## Sick Leave Credit Processing Information

Hours Per Day   
Comp Rate \$0.00  
Addition Pay \$0.00  
Total Salary

Medicare Part B ☐  
Medicare Part B Completed   
M/C Life Enrolled ☐  
PS-932 Status: N/A  
PS-932 Rec Date   
PS-932 Fax to CS

# New State of Retirement Packet

- All Electronic single, 4-5 page pdf document
- Contains all information in paper packet and more
- Customized for each employee, negotiating unit specific
- Many informational links provided (Sick Leave Calculator, Unions, Medicare)
- Employees expected to print their own forms





Office of General Services  
Business Services Center

## Retirement Package for CSEA-Represented Employees



Retiree Name Social Security # Negotiating Unit Retirement Date

XXX-XX-

☐ Enrolled in Benefits

☐ Not Enrolled in Benefits

Dear,

The Business Services Center (BSC) has been notified that you are retiring. The Benefits Unit is providing you this Electronic Retirement Packet to help you understand your benefits and responsibilities as a retiree. Please review the enclosed information carefully. Fill out any necessary forms and return prior to your retirement date shown above.

New York State employees are required to return all state equipment and/or property to their agency prior to leaving state service, e.g. laptops, phones, state IDs. New York State may withhold payments of lump sums until all state issued property is returned.

Please remember that you do not report to work on the effective date of your retirement. If you select August 31 as your retirement date, your last day of work is August 30.

NYSHIP requires retirees and their dependents to be enrolled in Medicare Parts A and B when first eligible for primary Medicare Coverage due to age or disability. Please review the Medicare & NYSHIP page for more information.

If you officially change your retirement effective date with Employees Retirement System:

- Call 518-457-4272 or email [OGS Business Services Center Benefits and Payroll Units](mailto:OGS.Business.Services.Center.Benefits.and.Payroll.Units), to ensure that an accurate effective date is on record with the BSC.
- Advise your supervisor of the change.

If you have any questions concerning your benefits or the material provided in this packet, please email [ogs.sm.BscBenefitsAdmin@ogs.ny.gov](mailto:ogs.sm.BscBenefitsAdmin@ogs.ny.gov) or call the BSC, Benefits Unit at (518) 457-4272.

Sincerely,

Robert Ellis, Human Resources Specialist I  
Business Services Center, Benefits Unit, Offboarding  
[ogs.sm.bscbenefitsadmin@ogs.ny.gov](mailto:ogs.sm.bscbenefitsadmin@ogs.ny.gov)  
518-457-4272

## Retirement Package for CSEA-Represented Employees



### Forms

The following forms **MUST** be signed and dated, and returned to the Business Services Center by email at: [OGS.sm.bscbenefitsadmin@ogs.ny.gov](mailto:OGS.sm.bscbenefitsadmin@ogs.ny.gov); or by fax at: 518-457-1879.

- ☒ [PS-404 New York State Health Insurance Transaction Form](#)  
This form **MUST** be completed and returned to the BSC prior to your last day of work.
- ☒ [PS-405 Dual Annuitant Sick Leave Credit Election](#)  
This form **MUST** be completed and returned to the BSC prior to your last day of work.
- ☒ [PS-406 2 Enrollment Form for Employees Eligible to Defer Health Insurance Coverage and Sick Leave Credit Calculation Indefinitely in Retirement](#)  
This form should be returned **ONLY** if you plan to defer your health insurance.

The following form **MUST** be notarized and returned to the New York State Employee Retirement System (ERS):

- ☐ [RS-6355 Survivor Benefit Program Form](#) (see pages 3-4 of this document)  
Return the notarized form to: NYS Retirement System, 110 State Street, Albany, NY 12242

### Sick Leave Credit

The Department of Civil Service: [Sick Leave Calculator](#).

When you retire, you may be able to use the value of your unused sick leave to offset the cost of NYSHIP coverage. If you are retiring with a Disability Retirement, use the [Disability Sick Leave Credit Calculator](#).

To use the calculator, click the link above, then select the option for "I am a New York State Active Employee (NY)" and press "Continue". Next, select your negotiating unit and health insurance plan and press "Continue". From the next page click the "Planning to Retire" link, then click on "Sick Leave Credit Calculator".

Input your Date of Retirement, Pay Rate, Standard Work Schedule, Hours of Unused Sick Leave (See your latest time-card) and Age at Retirement. Be sure to review the results for both Dual Annuitant Sick Leave Credit and Single Annuitant Sick Leave Credit as you must choose between these two options.

All information provided by this calculator is an estimate, based on the information you input. Your actual sick leave will be calculated at the time of your retirement. The amount of your sick leave credit may vary based upon additional time earned or used. You must select either the Single or Dual Annuitant option by completing form [PS-405](#) before your retirement date. You cannot change your annuitant selection after you have retired. If this form is not received prior to your retirement date, your sick leave credit will automatically default to the Single Annuitant Option.

If you have questions about your sick leave credit or annuitant options, please contact the BSC Benefits unit at: [ogs.sm.BscBenefitsAdmin@ogs.ny.gov](mailto:ogs.sm.BscBenefitsAdmin@ogs.ny.gov) or call 518-457-4272.

### Information for CSEA Retirees

[Information for Retirement Planning](#)  
[Medicare & NYSHIP](#)  
[Medicare & You](#)  
[Medicare Part B Enrollment Form](#)  
[Back to Work \(for returning retirees\)](#)  
[Planning for Retirement Booklet](#)

[Retiree Choices 2017](#)  
[Retiree Rates 2017](#)  
[Retirement Planning Video Library](#)  
[GOER Web Services YouTube Channel](#)  
[General Information Book](#)  
[Dental and Vision Fact Sheet](#)  
[Office of the State Comptroller's Retiree Resources Page](#)

### Survivor's Benefit Program

The Survivor's Benefit Program is a financial protection plan that provides a minimum death benefit to the survivors of New York State retired employees. Your beneficiary may receive a benefit of \$3,000.

Print the Eligibility of Retired Employee for Survivors Benefit (RS 6355), see pages 3-4 of this document, and complete section C and sign before a Notary Public. Return the notarized form to: NYS Retirement System, 110 State Street, Albany, NY 12242.

# New BSC Benefits “Planning for Retirement” WebEx

- 90 Minute presentation
- For BSC customer employees within 6 months of retirement
- - The retirement WebEx is currently being offered to BSC customers only; it's interactive. Suggest employees to sign up ASAP, as they fill up quickly.
- Questions and Answers, interactive presentation
- Employees Register in SLMS (well in advance)
- Scheduled Bi-Weekly
- PowerPoint available on BSC website
  - HR Customers – Benefits – Benefits Forms & Publications - Retirement



# Retirement Online - Notifications from NYSLRS

- Retirement notifications will be generated and available in *Retirement Online*.
  - Retirement Online will be the new notification method; More info to come.
- At the beginning, the new system only allows those with “Personnel Role” to receive retirement notifications.
- OSC is working on updating the system to allow those with “Contact Administrator Role” to receive notifications.
  - Security Admin roles being given out at the BSC. There should be one per agency, and two at the BSC. If the primary is out, contact the BSC to let a sub do the work.
- Until we receive confirmation from OSC that the “Contact Administrator Role” will have access to receive notifications, the BSC will receive the notifications and provide them to our Agency Liaisons to initiate retirement transactions.
  - May experience errors due to the timeframe of the launch.



# Retirement Online - Enrollment

- The BSC Benefits Onboarding Team will continue to handle membership enrollments by sending a fax to register an employee in NYSLRS until the new *Retirement Online* system is functioning.
- Once *Retirement Online* is up and running, NYSLRS will automatically enroll all new mandatory members.  
The BSC will have the ability to enroll members (i.e., Optional Members), in the system.
- **March 30, 2018 – May 15, 2018** –The Employer reporting and member enrollments will not be initiated during this time. A memo will be included in the Onboarding packets for those employees hired during this time period stating they may experience a delay in their enrollment which may result in arrears.
- **Mid-May 2018** is the expected timeframe that OSC will launch *Retirement Online* for employers.



# Payroll Administration

- |  |             |
|--|-------------|
| 1. Retirement Online                                   | Edward Ryan |
| 2. IA96R-DOL's Notice of Benefit Reimbursement Charges | Edward Ryan |
| 3. Tax Forms and Direct Deposits                       | Edward Ryan |

# Payroll Administration

## 1. Retirement Online

NYSERS will handle retirement loans and arrears. It has been confirmed that NYSERS will handle all arrears for employees who enrolled during the blackout period.

- Loans, arrears, or actual retirements will be automatic once retirement online is up.
- W-4, IT-2104, and Direct Deposits will now follow the employee.
- The employee will work directly with the retirement system for any arrears payments.
- The fingerprinting form is being updated and all double charged employees will be refunded.

## 2. IA96R - DOL's Notice of Benefit Reimbursement Charges

This is a form DOL sends to a state agency notifying the Agency that the Unemployment Insurance benefit payments made to their employee(s) have been charged to the agency's account and the state agency is to verify that the claimants listed on this form was actually employed by the state agency. BSC Payroll Unit does not need to receive a copy of this form because BSC Payroll does not need to take any action on such a notice.

## 3. Federal Tax Form W-4, NY State Tax Form IT -2104, and Direct Deposits:

These forms do not need to be filled out for employees being transferred from one state agency to another unless there are changes that need to be made.





# Personnel Administration

- 2018-2019 HCM Template Submittal Deadline Schedules

- On the HCM Portal

Gen Johnson

- 2018-2019 Admin & Inst Pay Period Schedules including Timesheet submittal, Miscellaneous Payment Spreadsheet, NYSTEP & PayServ deadlines

Gen Johnson

- These are drafted and waiting for approval; will be posted on the portal once completed.

Gen Johnson

- Query for Denied and Cancelled Templates

- NY\_AGY\_DENY\_CANL

- Emails will still be sent out by approvers when a template is denied or cancelled.

Gen Johnson

- BDA Salary Request Form



# BDA Salary Request Form

Notice from customer agencies of historical salary information being requested when agencies submit Budget Director Approval (BDA) forms. To assist in providing this additional information, BSC developed the new form for agencies to use in requesting needed salary information to submit a BDA.

The form and job aid detailing information to be supplied to complete salary calculation are available on the HCM Portal.

- Flat salary (for DBA) does not need to be submitted.

The use of this form will streamline BDA salary request process, assist in identifying and prioritizing requests.





**Office of General Services  
Business Services Center**

BSC Payroll Administration  
1220 Washington Avenue  
Building 5, Floor 4  
Albany, NY 12226-1900  
Fax: (518) 457-1879  
Inquiries:  
[SalaryCalculationsBSC@ogs.ny.gov](mailto:SalaryCalculationsBSC@ogs.ny.gov)

## Budget Director's Approval

This form is to only be used for information pertaining to BDA appointments.

Clear Form

Submit

### AGENCY INFORMATION

Agency Code	Effective Date	Name of Requestor	Requestor Telephone #
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### EMPLOYEE INFORMATION

First Name	Last Name	Employee ID	Social Security #
Title of New Position		Item Number	Bargaining Unit
			Jurisdictional Class

Grade	If 600, equated or NTE <small>If Grade 600, BSC will not complete Salary, Anniv Data, Inc Code, and FIS below unless indicated.</small>	Equated Grade Salary Request <input type="checkbox"/> Yes <input type="checkbox"/> No <small>By checking Yes, the agency is requesting a salary projection calculation for the equated grade as if the employee is moving to a grade position. It is the understanding that all NS salaries are agency discretion.</small>	Prior Agency (if transfer)
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### BSC SECTION

Salary as of January 1, 2016		
Salary Changes Since January 1, 2016		
Date	New Salary	Reason for Increase



**Office of  
General Services**

# Time & Attendance Administration

- BSC Announcements Dan Rivet
- Casual 71 Dan Rivet
- Additional Leave for Combat Veterans Shay Brickel
- CSEA Family Sick Leave Shay Brickel
- Leave for Cancer Screening Shay Brickel

# Reminder- Announcements

## Past Announcements:

- Holiday Compensation Waiver
- Leave for Cancer Screening
- Over40 Comp Time II Pilot Program (CSEA, PEF, DC-37 employees)

## Quarterly:

- Reminder to update Emergency Contact information in LATS including instructions

## Anticipated upcoming Announcements:

- How to complete your timesheet on a holiday (Memorial day, May 28<sup>th</sup> )
- Can sign up to automatically receive announcements



# Casual 71 Employees

Per Staffing Services Memo No. 1982-01, Casual 71 employees are to work a “casual” schedule that would not allow them to obtain time & attendance eligibility.

- Length of employment is shorter than six weeks a year  
Or
- Employee is required to work fewer than 20 hours per week  
Or
- Fewer than 60% of the employees in the title return for at least 2 consecutive seasons

However, if a Casual 71 employees works 50% or more for 19 consecutive pay period they become time & attendance eligible.

- In the process of gathering data and informing our agencies; hourly reporting; reach out to agencies at 15 pay periods.

As a result, BSC Time & Attendance will begin including Casual 71 employees in the hourly eligibility report we provide each pay period to agencies.

More information to follow.



**Office of  
General Services**

# Additional Paid Leave for Combat Veterans - Update

- Current proposal is 5 additional days of paid leave
  - Five days instead of 10; Directed to send questions to CS Attendance and Leave Unit.
- No current announcement with a potential 2019 release date

# CSEA Family Sick Leave Entitlement

- LATS-NY can now accommodate usage of Family Sick Leave for up to 25 days
- Currently new maximum has been opened for all negotiating units
- Will send information to the agencies; set to maximum at appropriate amount.
- We will audit to make sure that outside of CSEA employees nobody exceeds their 15 day entitlement
- Time and Attendance will work with agencies if employees are found to be exceeding their respective maximum usage
- With LATS-NY release 10.2 in late spring a permanent fix will be implemented to limit usage per negotiating unit



# Leave for Cancer Screening

- Employees were to continue using codes 1500-Breast cancer Screening or 1501-Prostate Cancer Screening until March 17, 2018.
- Starting March 18<sup>th</sup>, employees should have started using code 1518-Cancer Screening
  - Under one code
- Employees are entitled to up to 4 hours per calendar year
- Providing medical documentation for this code usage is at the **discretion of the agency** and questions regarding should be handled at the agency level

# HRIT

- Position Management Demo

Amy Swint

Triticia Pena

- Templates are often denied if the DBS is incorrect; Mass DBS update available to agencies by HRIT Unit.
- Don't remove history; delete as little as possible, and retain everything

## HR Quarterly Report Cards

**Beckie Cusack**

## HR Quarterly Report Cards

The BSC is looking for agency volunteers to participate in the HR Quarterly Report Work Group.

- Approximately 3 working meetings
- On site at the BSC

### Why a Work Group?

- What data is most valuable to you?
- What is the best format for it to be understood at the agency?
- What else would you like to see added to a report card?

If your agency is interested in joining the work group, please email Customer Care by April 18.

[BSCCustomerCare@ogs.ny.gov](mailto:BSCCustomerCare@ogs.ny.gov)

Invitations will be sent out by April 20<sup>th</sup>.



**Office of  
General Services**

# Next HR Users Group

- Thursday, June 14th, 2018 9:00 a.m. to 10:30 a.m.
- Agenda items are due Monday, May 14th, 2018 and can be submitted at <https://bsc.ogs.ny.gov/content/hr-users-group> or emailed to [BSCCustomerCare@ogs.ny.gov](mailto:BSCCustomerCare@ogs.ny.gov)

