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NY01- 53
PE01- 41
PA01- 23

TO: Agency Health Benefits Administrators

FROM: Employee Benefits Division

SUBJECT: NYBEAS PeopleSoft 7.5 - Worklists

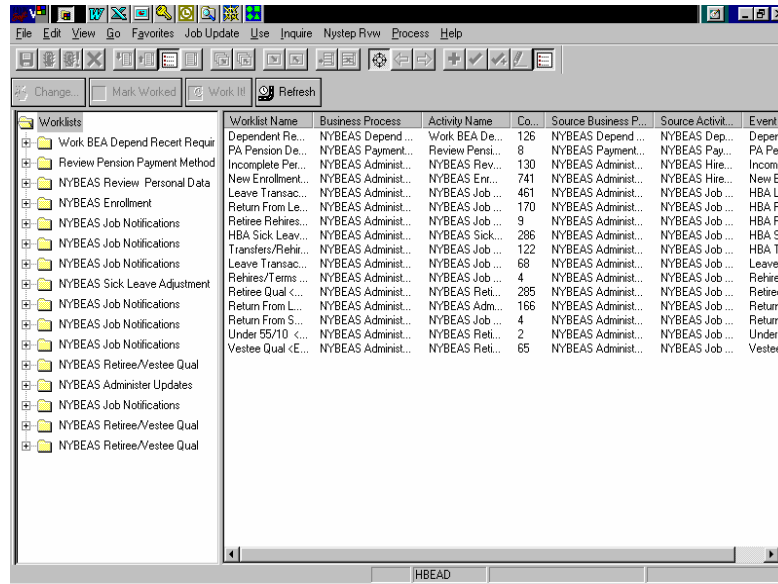
DATE: November 13, 2001

The Department of Civil Service has upgraded its NYBEAS system to PeopleSoft 7.5. The changes to worklists are explained in this memo. We are aware that some worklists are not working properly. We thank you for your patience while these problems are corrected. For more information regarding the conversion to PeopleSoft 7.5, refer to HBA memo NY01-050, PE-39 or PA01-21.

WORKLISTS

Worklists are accessed the same way by a single click on the worklist icon. The worklists are displayed in a series of folders on the left side of the screen. Details regarding each worklist folder are displayed on the right side of the screen.

WORKLIST FOLDERS



**DETAILS OF
WORKLIST
FOLDERS**

The worklists that you may see are summarized below. Depending on your agency type, you may or may not see all the different worklist types.

Worklists (Left Side of Screen)	Worklist Name (Right Side of Screen)
Work BEA Depend Recert Rquir	Dependent Recertification
Review Pension Payment Method	PA Pension Deductions
NYBEAS Review Personal Data	Incomplete Personal Data
NYBEAS Enrollment	New Enrollment
NYBEAS Job Notifications	Leave Transactions
NYBEAS Job Notifications	Return from Leave
NYBEAS Job Notifications	Retiree Rehires
NYBEAS Sick Leave Adjustment	HBA Sick Leave
NYBEAS Job Notifications	Transfers/Rehires

IMPORTANT WORKLIST FEATURES!

- **Worklist columns cannot be sorted, as they could be in the previous NYBEAS PeopleSoft version. We have been told that this feature will be restored when we upgrade to PeopleSoft 8.0.**
- **Some of the column widths displayed on the right side of the screen are abbreviated. To display the entire column, place your cursor on the right hand side of bar next to the column name, which appears in grey at the top of the screen. A black bar with two arrows will appear. Click your mouse and drag the column to the right to adjust to the proper width.**

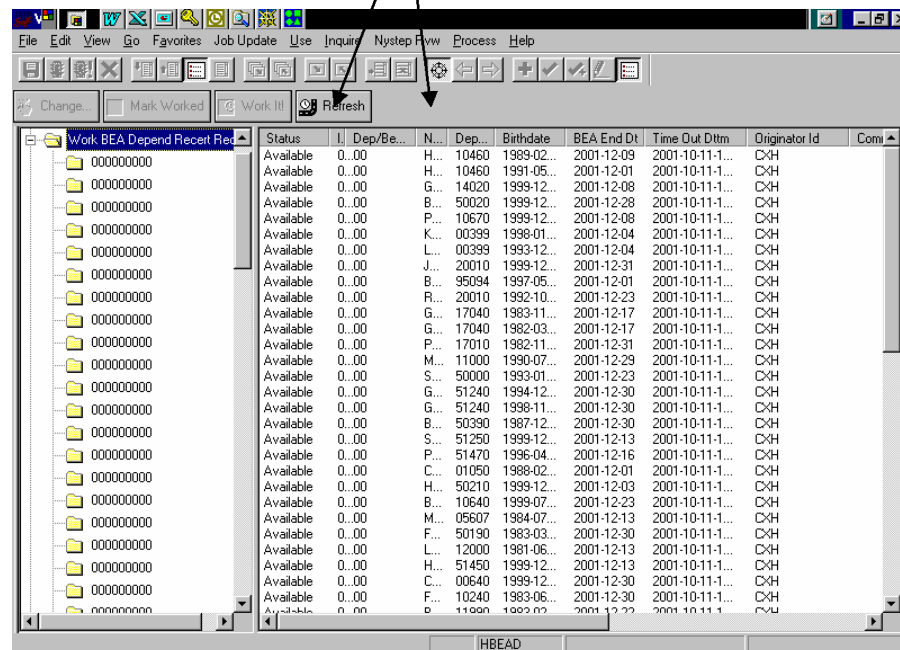
- To access the worklist, double click on worklist name on the right side of the screen.

- Entries contained in the worklist selected will be displayed on the left side of the screen under the worklist name. The right side of the screen displays the details of each entry.
- Double click on the entry to be worked on the right side of the screen. This will take you to the appropriate NYBEAS USE/INQUIRE panel. The actual processing of the entry has not changed.
- Some column headings are abbreviated.

REMEMBER TO ADJUST COLUMN WIDTHS!

I = Identification Number
N=Name

ENTRIES



**DETAILS OF
ENTRIES**

The description for the buttons for this screen are as follows:

Button	Description
Change	Click on the “Change” button to display the Change Worklist Instance Box.
Mark Worked	Information worklists open up Inquire screens which do not allow you to save new information. Therefore, you must click on the “Mark Worked” button to remove these items from the worklist.
WorkIt!	Use the “Work It! Button to select a worklist item or double-click on the appropriate worklist row.
Refresh	You can update the list by clicking the “Refresh” button.

If you have any questions regarding how to use NYBEAS, please contact your processor.