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NY14-32

**TO:** New York State Agency Health Benefits Administrators

**FROM:** Employee Benefits Division

**SUBJECT:** 2015 Productivity Enhancement Program (PEP)

**DATE:** October 31, 2014

The Productivity Enhancement Program (PEP) for 2015 is available to employees represented by CSEA, UUP, PEF, DC-37, Management/Confidential employees and Legislative and Judicial Branch employees.

The program allows eligible employees to exchange previously accrued annual leave and/or personal leave, in return for a credit which reduces their share of New York State Health Insurance Program (NYSHIP) premium on a biweekly basis.

For PEP eligibility requirements, calculation of PEP credit and enrollment period dates, please refer to Attendance and Leave Policy Bulletin 2014-02. In addition to an overview of the program, the memo includes the 2015 PEP Program Description and the 2015 PEP Enrollment.

Separately, SUNY Administration and the benefits offices for Legislative and Judicial branch employees will make available the 2015 PEP Program Description and Enrollment form specific to their employees.

#### PEP PREMIUM CONTRIBUTION CREDIT

The 2015 PEP credit will begin coincident with the same payroll period for the first 2015 health insurance premium deduction. All employees will have 26 paychecks credited with the 2015 PEP credit. Assuming no retroactivity, the following chart indicates the start of the 2015 PEP credits for the various payrolls.

Employee's Payroll Cycle	First Check with 2015 PEP Credit	First Check with 2015 Health Insurance Premium Deduction
Administration Lag	12/31/2014	12/31/2014
Administration Current	12/17/2014	12/17/2014
Institution Lag	12/24/2014	12/24/2014
Institution Current	12/11/2014	12/11/2014
Triple Lag	1/08/2015	1/08/2015

The credit that will be applied to the biweekly employee share of the health insurance premium is reflected in the charts below according to Salary Grade or the employee share of the employee's NYSHIP option, whichever is less. Part-time employees are prorated based upon their payroll percentage.

## Eligible CSEA, PEF (non-teachers), DC-37, Management/Confidential<sup>1</sup>, Judicial Branch employees and Legislative Branch employees<sup>2</sup>

Full-time employees in a position at or equated to Salary Grade 17:

Forfeited Days	NYSHIP Credit	Bi-weekly Credit		
3	\$500	\$19.23		
6	\$1000	\$38.46		

Full-time employees in a position at or equated to Salary Grade 18 through 24:

Forfeited Days	NYSHIP Credit	Bi-weekly Credit		
2	\$500.00	\$19.23		
4	\$1,000.00	\$38.46		

## **UUP-Represented employees**<sup>3</sup>

Refer to the 2015 PEP Program Summary and Enrollment form for UUP represented employees from SUNY Administration for additional guidance.

UUP Employee Group	Forfeited Days	NYSHIP Credit	Bi-weekly Credit
Employees earning at or below \$62,998 annually	3	\$500	\$19.23
Employees earning above \$62,998 and below \$90,022 annually	2	\$500	\$19.23

<sup>&</sup>lt;sup>1</sup> M/C employees of SUNY should refer to the 2015 PEP Program Description and Enrollment form from SUNY Administration for specific PEP eligibility information.

<sup>&</sup>lt;sup>2</sup> Legislative and Judicial Branch employees should refer to the 2015 PEP Program Description and Enrollment form from their benefits office for specific PEP eligibility information.

<sup>&</sup>lt;sup>3</sup> UUP represented employees should refer to the 2015 PEP Program Description and Enrollment form from SUNY Administration for specific PEP eligibility information.

## PEF Institution Teachers in a position at or equated to Salary Grade 17 and below:

Days Forfeited	NYSHIP Credit	Bi-weekly Credit
1	\$166.66	\$6.41
2	\$333.32	\$12.78
3	\$499.98	\$19.23
4	\$666.64	\$25.34
5	\$833.30	\$32.05
6	\$999.96	\$38.46

### PEF Institution Teachers in a position at or equated to Salary Grade 18 through 24:

Days Forfeited	NYSHIP Credit	Bi- weekly Credit
1	\$250	\$9.62
2	\$500	\$19.23
3	\$750	\$28.85
4	\$1,000	\$38.46

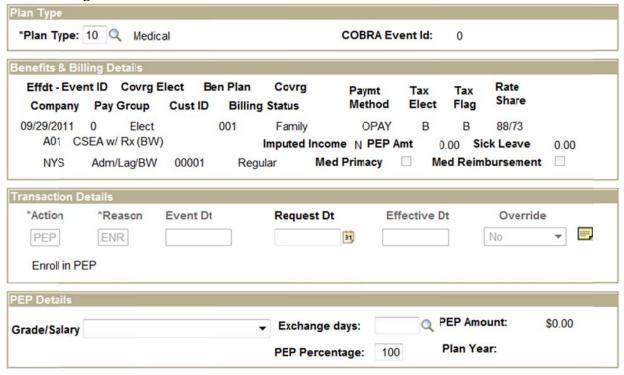
Agencies are responsible for distribution and retention of the enrollment forms and for the coordination between the agency personnel office and the HBA, with respect to certification of accrual adjustment(s) and initiating the PEP credit on NYBEAS.

#### NYBEAS PROCESSING

#### To ENTER the Health Insurance Premium Contribution Credit for PEP

The HBA will process a PEP/ENR to enter the premium contribution credit to NYBEAS for PEP (see below). This transaction is part of the PEP enrollment panel. The credit will show on the enrollee's billing record as a premium credit.

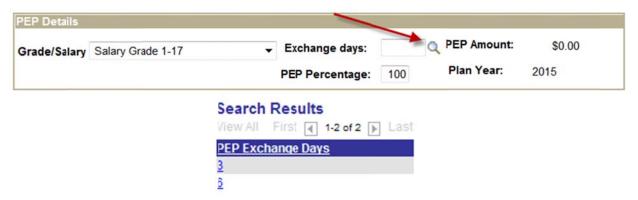
- Follow the NYBEAS Navigation Menu links:
   Benefits > Transactions > PEP > PEP Enrollment
- An input screen will display. Enter the enrollee's identification number in the search dialog box and click the search button.



- In the **Plan Type** field, enter **10** (for Medical). Press **Tab**.
- The **Action and Reason** fields will automatically populate (**PEP/ENR**).
- In the **Request Dt** field, enter the date of signature on the **PEP** enrollment form. The date should be between **October 20, 2014 November 28, 2014** for all eligible employees. Press **Tab**.
- In the **PEP Grade** field enter a 1, for employees SG-1 SG-17, enter a 2, for employees SG-18 SG-24. **This is a required field in order to calculate the PEP credit accurately.**



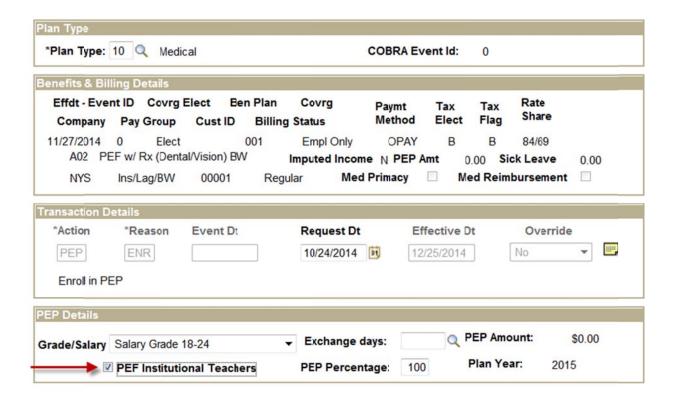
- In the PEP **Percentage field** type the employee's payroll/employment percentage. Click **Save**. (The default is 100%)
- In the **Exchange days** field, enter the number of days of annual/personal leave the employee forfeited for PEP. For SG-1 17, your available options are 3 or 6 days.



For SG-18 - 24, your available options are 2 or 4 days.



• If the employee is a PEF Teacher, select the box **PEF Institutional Teachers**. This is only to be used for teachers represented by PEF. This box will display once you tab out of the request date field.



• If the enrollee is a PEF Teacher SG 1 through 17 you should enter 1, 2, 3, 4, 5, or 6 days in the Exchange days field of the PEP Details section of the PEP enrollment form. This is only to be used for teachers represented by PEF.



• If the enrollee is a PEF Teacher SG18 through 24 you should enter 1, 2, 3, or 4 days in the Exchange days field of the PEP Details section of the PEP enrollment form. This is only to be used for teachers represented by PEF.



To view the PEP percentage, follow the NYBEAS Navigation Menu links: **Benefits > History > PEP > Enrollment Inquiry** 

PEP Enrollment Info				Customize   Find   View All   ## First 1 of 1 1 L				f 1 🕑 Last	
Action Date	Effective Date	Sequence	CBR Evt ID	<u>PEP Plan</u> <u>Year</u>	Exchange Days	PEP Percentage	PEP Grade	PEF Institutional Teachers	PEP Amt
10/24/2014	01/01/2015	0	0	2015	3.00	100	1-17	N	19.23

To view the PEP credit calculated, follow the NYBEAS Navigation Menu links: **Benefits > History > NYBEAS Update History** and click on the **Billings** tab.

Plan Type										View A	All I	First 🗹	1 of 1	Last
Plan Ty	pe:	Medi	cal	10										
Billings De	tails								View A	ui i 🏭	Fir	st 🖪 1	6 of 6	Last
Effective Date	CBR Evtld	Comp	CustID	Rate Qual	Rate Share	Billing	Paygroup	Surchg %		Tax Elect	Tax Flag	Imp Inc	Sick Leave Amt	PEP Amt
01/01/2015	0	NYS	00001	E1	8873	Regular	Adm/Lag/BW	0	OPAY	В	В	N	0.00	19.23
09/29/2011	0	NYS	00001	E1	8873	Regular	Adm/Lag/BW	0	OPAY	В	В	N	0.00	0.00
10/08/2010	0	NYS	00001	E	% Empl	Regular	Adm/Lag/BW	0	OPAY	В	В	N	0.00	0.00
01/01/2010	0	NYS	00001	E	% Empl	Regular	Adm/Lag/BW	0	OPAY	В	В	Y	0.00	0.00
10/02/2003	0	NYS	00001	E	% Empl	Regular	Adm/Lag/BW	0	OPAY	В	S	Y	0.00	0.00
08/24/2006	0	NYS	00001	E	% Empl	Regular	Adm/Lag/BW	0	OPAY	В	В	N	0.00	0.00

To view the actual PEP credit applied, follow the NYBEAS Navigation Path links:

### Benefits > History > NYBEAS Update History and click on the Accounting tab.

Note: The actual PEP credit applied will be the lesser of the calculated amount or the enrollee's health insurance premium.

### **Timing of NYBEAS Processing**

Since the transaction cannot be keyed until after the certification of the accrual adjustment, coordination with your agency's personnel/payroll staff who handles this is the key to PEP credit processing. The following chart indicates the dates to key the transaction and the corresponding paycheck which will be impacted. Be prepared to answer questions once the employee's paycheck has been affected.

#### This panel will be open for NYBEAS keying until January 21, 2015.

Employee's Payroll Cycle	NYBEAS Keying Window	Impacted Paycheck	Paychecks credited with PEP Credit	# of Retro PEP Credits
Administration Lag	11/03/14 - 12/16/14	12/31/2014	12/31/14 - 12/16/15	0
Administration Current	11/03/14 - 12/02/14	12/17/2014	12/17/14 - 12/02/15	0
Institution Lag	11/03/14 - 12/09/14	12/24/2014	12/24/14 - 12/10/15	0

Institution Current	11/03/14 - 11/25/14	12/11/2014	12/11/14 - 11/26/15	0
Triple Lag	11/03/14 - 12/23/14	1/08/2015	01/08/15 - 12/23/15	0
Employee's Payroll Cycle	NYBEAS Keying Window	Impacted Paycheck	Paychecks credited with PEP Credit	# of Retro PEP Credits
Administration Lag	12/17/14 - 12/30/14	1/14/2015	01/14/15 - 12/16/15	1
Administration Current	12/03/14 - 12/16/14	12/31/2014	12/31/14 - 12/02/15	1
Institution Lag	12/10/14 - 12/23/14	1/08/2015	01/08/15 - 12/10/15	1
Institution Current	11/26/14 - 12/09/14	12/24/2014	12/24/14 - 11/26/15	1
Triple Lag	12/24/14- 01/06/15	1/22/2015	01/22/15 - 12/23/15	1
Employee's Payroll Cycle	NYBEAS Keying Window	Impacted Paycheck	Paychecks credited with PEP Credit	# of Retro PEP Credits
Administration Lag	12/31/14 - 01/13/15	01/28/2015	01/28/15 -12/16/15	2
Administration Current	12/17/14 - 12/30/14	01/14/2015	01/14/15 12/02/15	2
Institution Lag	12/24/14- 01/06/15	01/22/2015	01/22/15 - 12/10/15	2
Institution Current	12/10/14 - 12/23/14	01/08/2015	01/08/15 - 11/26/15	2
Triple Lag	01/07/15 - 01/20/15	02/05/2015	02/05/15 - 12/23/15	2