

PROCESSING SICK LEAVE FROM A WORKLIST

When separating from State service, an enrollee with coverage in their own right prior to retirement including Opt-out will appear on the NYBEAS worklist titled **HBA Sick Leave**. HBAs are required to “work” these “pending” retirees off the worklist by updating the sick leave credit information. HBAs should also process for enrollee who have elected to defer the start of their retiree coverage by completing the *NYSHIP Health Insurance Deferral Election Form* (PS-406.2).

Employees’ NYSHIP benefits will continue during this time. However, billing remains temporarily paused while EBD reviews the account. Enrollees will not be charged premiums at the time, but will be required to pay the owed balance retroactively when EBD eventually qualifies them for retiree coverage. This pause is referred to as “Pending” billing status, indicated on the **Billings** panel. During this period, HBAs should enter sick leave information and EBD will review the enrollee’s eligibility for retiree coverage.

Events
Benefits
Medicare Part D
Hold Harmless
Programs
Billings

Employee Information

██████████
EmplID: ██████████
Empl Rcd #: 0

Plan Type View All First 1 of 1 Last

Plan Type: Medical 10

Billings Details View All First 1 of 3 Last

Effective Date	CBR EvtId	Comp	CustID	Rate Qual	Rate Share	Billing	Paygroup	Surchg %	Pay Meth	Tax Elect	Tax Flag	Imp Inc	Sick Leave Amt	PEP Amt
08/19/2021	0	NYS	00001	E2	84/69	Pending	Mnthly-NYS	0	DIRP	B	A	N	██████████	0.00
08/29/2013	0	NYS	00001	E2	84/69	Regular	Adm/Lag/BW	0	OPAY	B	B	N	0.00	0.00
01/30/2006	0	NYS	00001	E	% Empl	Regular	Adm/Lag/BW	0	OPAY	B	B	N	0.00	0.00

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Note, if sick leave information is not entered within the window before EBD qualifies for retiree coverage, HBAs will need to fax the relevant information directly to EBD to update. HBAs will know a retiree has been qualified when the **Billing** panel reflects “Regular” billing status. An error message will appear if an attempt to enter sick leave information is made after a retiree has been qualified. HBAs **should not** submit a correction request to update sick leave information. The correction request will be sent back as “Invalid Return to HBA.” HBAs must fax this information directly to EBD.

Events | Benefits | Medicare Part D | Hold Harmless | Programs | **Billings**

Employee Information
 [Redacted] EmplID: [Redacted] Empl Rcd #: 0

Plan Type View All First 1 of 4 Last

Plan Type: Medical 10

Billings Details View All First 1-2 of 2 Last

Effective Date	CBR Evtld	Comp	CustID	Rate Qual	Rate Share	Billing	Paygroup	Surchg %	Pay Meth	Tax Elect	Tax Flag	Imp Inc	Sick Leave Amt	PEP Amt
07/01/2021 0		NYS	00001	E2	84/69	Regular	Mnthly-NYS	0	EPEN	B	A	N	123.34	0.00
09/06/2012 0		NYS	00001	E2	84/69	Regular	Ins/Lag/BW	0	OPAY	B	B	N	0.00	0.00

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Note, processing sick leave for Part-time employees require additional steps. Please refer to the *Sick Leave for Part-Time Employees* instructions attached to HBA memo NY21-16.

Working Items On The HBA Sick Leave Worklist

To begin processing, log into NYBEAS and click on **Worklist** at the top right corner of the window. This will open all the worklists that you have access to.



Home | Messages(5) | **Worklist** | Add to Fa

Broadcast Messages Find First 1-5 of 5 Last

Scroll down to find the appropriate **HBA Sick Leave** worklist and then click **Detail**. Scroll further to see the list of all the agency's enrollees that will need a sick leave adjustment processed.

Worklist Summary						Customize	Find	View All	First	1-6 of 6	Last
	Detail	Filter	Business Process	Activity	Worklist	Count					
1	Detail	Filter	NYBEAS Administer Workforce			959					
2	Detail	Filter	NYBEAS Administer Workforce			1					
3	Detail	Filter	NYBEAS Administer Workforce			24					
4	Detail	Filter	NYBEAS Administer Workforce	NYBEAS Job Notifications	HBA Sick Leave <HBA>	17					
5	Detail	Filter	NYBEAS Administer Workforce			85					
6	Detail	Filter	MyNYSHIP Transactions			7					

Click **Work It**.

Worklist Details									Customize	Find	View All	First	1-15 of 17	Last
Mark Worked	ID	Emp Rcd#	DeptID	Name	Employee Status	Percent Worked	Depend. ID	Sent From						
1	<input checked="" type="checkbox"/>	Work It	1	D	12000	F		PCONTROL						
2	<input checked="" type="checkbox"/>	Work It	0	D	01113	F		PCONTROL						
3	<input checked="" type="checkbox"/>	Work It	0	D	23000	F		PCONTROL						

The following page will populate:

Sick Leave Adjustments

Employee Information

EmplID: ----- Empl Rcd #: 0

Select Plan Type

*Plan Type: COBRA Event Id: 0

Enrollee's Current Coverage Info

Effdt - Event ID	Covrg Elect	Ben Plan	Covrg	Paymt Method	Tax Elect	Tax Flag	Rate Share
Company	Pay Group	Cust ID	Billing Status				
0							
				Imputed Income	PEP Amt	0.00	Sick Leave 0.00
				Med Primacy	<input type="checkbox"/>	Med Reimbursement	<input type="checkbox"/>

Select Action

*Action	*Reason	Event Dt	Request Dt	Effective Dt
<input type="text" value="SCK"/>	<input type="text"/> <input type="button" value="🔍"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Enter **Plan Type** of **10** for Medical.
The **Reason Code** will be **FIX**.

The **Event Date** should automatically populate with the effective date the enrollee had a change to a retiree Benefit Program. Usually, R01 or R21 if they have M/C Life Insurance.

Sick Leave Adjustments

Employee Information

URBAN ANDREW C EmplID: 119599902 Empl Rcd #: 0

Select Plan Type

*Plan Type: Medical COBRA Event Id: 0

Enrollee's Current Coverage Info

Effdt - Event ID	Covrg Elect	Ben Plan	Covrg	Paymt Method	Tax Elect	Tax Flag	Rate Share
09/05/2019 0	Elect	001	Empl Only	EPEN	B	A	84/69
R01	Retiree w/ Rx (90/75)			Imputed Income N PEP Amt	0.00	Sick Leave	0.00
NYS	Mnthly-NYS	00001	Regular	Med Primacy	<input type="checkbox"/>	Med Reimbursement	<input type="checkbox"/>

Select Action

*Action	*Reason	Event Dt	Request Dt	Effective Dt
<input type="text" value="SCK"/>	<input type="text" value="FIX"/> <input type="button" value="🔍"/>	<input type="text" value="09/05/2019"/> <input type="button" value="📅"/>	<input type="text" value=""/>	<input type="text" value="09/05/2019"/>
Sick Leave Update				

Once this information is inputted, the bottom portion of the transaction page will become available.

Sick Leave Adjustments

Employee Information									
						EmplID:	Empl Rcd #: 0		
Select Plan Type									
*Plan Type: 10  Medical						COBRA Event Id: 0			
Enrollee's Current Coverage Info									
Effdt - Event ID	Covrg Elect	Ben Plan	Covrg	Paymt Method	Tax Elect	Tax Flag	Rate Share		
09/05/2019 0	Elect	001	Empl Only	EPEN	B	A	84/69		
R01 Retiree w/ Rx (90/75)		Imputed Income N		PEP Amt	0.00	Sick Leave	0.00		
NYS	Mnthly-NYS	00001	Regular	Med Primacy	<input type="checkbox"/>	Med Reimbursement	<input type="checkbox"/>		
Select Action									
*Action	*Reason	Event Dt	Request Dt	Effective Dt					
SCK	FIX 	09/05/2019 		09/05/2019					
Sick Leave Update									
Retirement Type	<input type="text"/> 	System	1 	Date	07/30/2019	Birthdate:		07/19/1964 	
*Sick Lv. Type	<input type="text"/> 	Hours		<input type="text"/>					
Std Hrs/Wk	<input type="text"/> 	Annual Salary	<input type="text"/>		Hourly Rate	Amt:		Preferred Payment	

This bottom portion of the page will require the data to be logged consecutively from left to right and top to bottom, otherwise the information will not update correctly. Click the spyglass icon for relevant fields to view applicable options.

Retirement Type	<input type="text"/> 	System	1 	Date	09/30/2019	Birthdate:		07/28/1956 	
*Sick Lv. Type	<input type="text"/> 	Hours		<input type="text"/>					
Std Hrs/Wk	<input type="text"/> 	Annual Salary	<input type="text"/>		Hourly Rate	Amt:		Preferred Payment	

Starting with **Retirement Type**, choose **SERV** (for regular retirements) or **DISA** (for disability retirements) if you have received proof from the retirement system that the enrollee has been approved for a disability retirement. This information should be sent to EBD.

DISA	RETIRED DUE TO DISABILITY
SERV	REGULAR RETIREMENT TYPE
Cancel	

The **System** asks for the name of the Retirement System that the enrollee is a member of. Valid options are **1, 2, 4, 8, or 9**.

Select one of the following values:

1	Employee's Retirement System
2	Teacher's Retirement System
[REDACTED]	
4	State Police Retirement System
[REDACTED]	
8	New York City Retirement System
9	TIAA/CREF
Cancel	

Input the enrollee's retirement date, the same as what is listed in the NYBEAS **Job** panel, into the applicable **Date** field. If the enrollee was awarded a disability retirement and the date is different than the date listed in the NYBEAS Job panel, forward the sick leave information to EBD.

Retirement Type	<input type="text"/>	System	1	Date	09/30/2019	Birthdate:	07/28/1956	
*Sick Lv. Type	<input type="text"/>	Hours	<input type="text"/>					
Std Hrs/Wk	<input type="text"/>	Annual Salary	<input type="text"/>	Hourly Rate				
							Amt:	Preferred Payment

Sick Lv. Type is for the annuitant option chosen by the enrollee. If the enrollee chose the Single Annuitant Option, or didn't elect an annuitant option prior to retirement, select **SnglAnnuit**. If the enrollee elected the Dual Annuitant Option, select **DualAnnuit** (a completed PS-405 must be on file). If the enrollee had no sick leave hours at all, select **None**.

Search Results

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<u>BEA Sick Leave Type</u>	<u>Translate Long Name</u>
SnglAnnuit	Single Annuitant Sick Leave
DualAnnuit	Dual Annuitant Sick Leave
None	None

Note, if **None** was selected, the rest of the boxes will be greyed out. Click **Save**. At this point, this enrollee is completed.

Retirement Type	<input type="text" value="SERV"/>	System	<input type="text" value="1"/>	Date	<input type="text" value="07/30/2019"/>	Birthdate:	<input type="text" value="07/19/1964"/>	
*Sick Lv. Type	<input type="text" value="N"/>	None	Hours	<input type="text"/>				
Std Hrs/Wk	<input type="text"/>	Annual Salary	<input type="text"/>	Hourly Rate	Amt: Preferred Payment			

Next enter the **Hours** of unused sick leave, up to 200 days (PIA and PBA may only use 165 days)

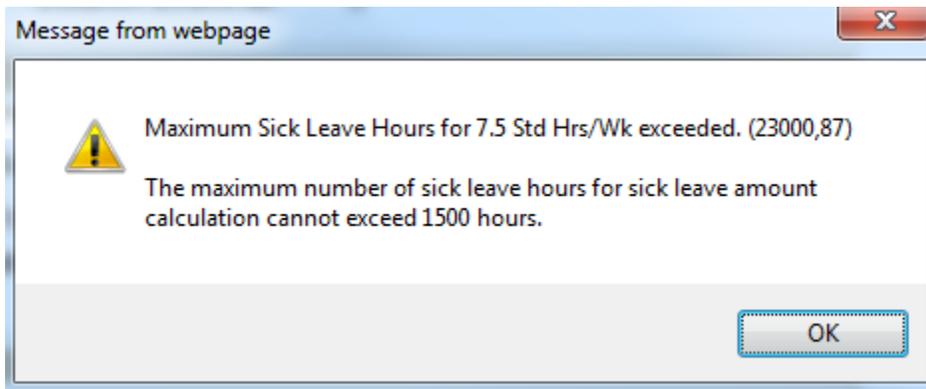
Retirement Type	<input type="text"/>	System	<input type="text" value="1"/>	Date	<input type="text" value="09/30/2019"/>	Birthdate:	<input type="text" value="07/28/1956"/>	
*Sick Lv. Type	<input type="text"/>	Hours	<input type="text"/>					
Std Hrs/Wk	<input type="text"/>	Annual Salary	<input type="text"/>	Hourly Rate	Amt: Preferred Payment			

Enter how many hours per day the enrollee worked in the **Std Hrs/Wk** field.

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<u>Standard Hours</u>	<u>Description</u>
7	Standard hours
7.5	Standard hours
8	Standard hours
10.6	Standard hours

If more than the maximum allowable hours is entered in the **Std Hrs/Wk** field, the following error message will populate:



Next, enter in the enrollee's **Annual Salary** at the time of their retirement. Once the **Annual Salary** is entered, use the Tab button to see the enrollee's **Hourly Rate** as well as the sick leave credit listed after **Amt.**

Retirement Type	SERV	System	1	Date	07/30/2019	Birthdate:	07/19/1964	
*Sick Lv. Type	A	SnglAnnuity		Hours	1062.25			
Std Hrs/Wk	7.50	Annual Salary	83752.000	Hourly Rate	42.80	Amt:	134.91	Preferred Payment

A red arrow points to the "Annual Salary" field.

Check to make sure that all the information was entered correctly and click **Save**. Subsequently, the information will be greyed out except the **Std Hrs/Wk** and the **Annual Salary**.

Events

Benefits

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Employee Information

EmplID:

Empl Rcd #: 0

Plan Type

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Last

Plan Type: Medical 10

Event Information

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Last

Action Date	Effective Date	Eff Seq	Action	Reason	CBR Evtld	Ovrd Sw	Source ID	Request Date	Event Date	User ID	Dep Info	Comment	View Audit Info
10/07/2019	09/05/2019	0	SCK	Sick Leave Update	0	N			09/05/2019	MPB4			
08/05/2019	09/05/2019	2	PGM	Benefit Program Change	0	N	JOBUPDTE			PCONTROL			
05/09/2019	04/18/2019	0	CCO	Chg Ind - Voluntarily	0	N		04/15/2019		DDJ1			