

Navigating Retirement and Savings Plans in PayServ 9.2

October 22, 2021

Bureau of State Payroll Services Retirement & Savings Plan Team



NYS COMPTROLLER

THOMAS P. DiNAPOLI

Presenters

- Jamie Kelly, Team Lead
- Lori Coalts
- Christopher Hanson



Agenda

- Back to Basics
- Payroll Bulletins
- New ORP/VDC Arrears Calculator
- ORP/VDC participants breaks in service
- 9.2
 - What hasn't changed.
 - What has changed.
- Entering new retirement selections and 403b deductions

Back to Basics

PayServ Bulletin Board Messages

- Important system alerts such as outages, upcoming changes, compressed schedules, etc., are periodically posted to the PayServ Bulletin Board
- PS Query and Control-D also have bulletin boards



New York State Office of the State Comptroller

Thomas P. DiNapoli, State Comptroller

PayServ Bulletin Board

Announcements

Welcome to PayServ! This Bulletin Board will provide you with important payroll-related information. The most recent notices will be posted at the top of the page. Check the Bulletin Board for new information each time you log into PayServ.

09/07/2021 - Processing Dates for PEF Salary Increases - Payroll Services has scheduled the processing of the PEF retroactive 2019, 2020, and 2021 salary increases. These increases will be processed in paychecks dated November 4, 2021 (Institution) and November 10, 2021 (Administration). The processing dates for the other PEF contractual payments have not yet been determined. Further bulletin board messages will be issued as processing dates become available. Payroll Bulletins for the salary increases will be issued as soon as practicable.

Removal Date: 09/24/2021

08/27/2021 - DIRECT DEPOSIT FRAUD ALERT : There has been a recent increase of fraudulent direct deposit forms submitted to agency payroll offices by fax, employee's personal e-mail and hacked work e-mail accounts. Upon receipt of a direct deposit request, agencies should verify the employee's name, work phone number and NYS Employee ID are present on the direct deposit form. Agencies should contact the employee by telephone to verify they submitted the request before entering the transaction in PayServ. These measures will help ensure the employee's earnings are not deposited into a fraudulent account. For steps to avoid Direct Deposit fraud see [Payroll Bulletin 1842](#). Questions regarding direct deposit practices may be directed to the DDRReturnsAndReversals@osc.ny.gov.

Removal Date: None

08/16/2021 - SS/MED REFUNDS - OSC is processing SS/Med refunds related to batches 2011-2016, 2025 and 2029. Refunds will be issued in the 08/26/2021 (Institution) checks and 09/01/2021 (Administration) checks. These are separate checks with a TFW (Prior Yr Soc Sec/Med Refund WC) or TF7 (Prior Yr Soc Sec/Med Refund).

Removal Date: 09/16/2021

Proceed to PayServ

PayServ Shortcuts

Payroll Services Directory

Payroll Services Web Page

PayServ Navigation Guide

Agency Auditor Listing

Payroll Manuals

Payroll Check Notification Report

Deduction Customer Service Contacts

Agency Payroll Officer Directory

NYSPO Coordinator List

Close Window



Back to Basics

Payroll Users Group (PUG)

- Allows partnership between OSC and agency staff
- Serves as a forum to improve payroll processing performance, address issues of mutual concern, and develop opportunities to network with peers



PUG Newsletter

PAYROLL USERS GROUP NEWS

July 2021

Issue No. 12

WELCOME

From **Brian Moulton**
Director of State Payroll Services

Welcome to the July 2021 edition of the **PUG Newsletter**.

As we move through the wettest summer I can remember, we have remained very busy in Payroll Services as we continue to process the deferred 2020 and 2021 salary increases. At this point we have together processed retroactive salary increases for over 120,000 employees. The processing dates of the deferred increases for the remaining bargaining units have all been scheduled.

The processing dates for the new PEF contract have not been set yet but our teams are currently analyzing the requirements and developing an implementation plan.

Please refer to the PayServ Bulletin Board for dates and keep an eye out for the associated Payroll Bulletins.

IN THIS ISSUE:

- What's New
- Section Updates
- Payroll Bulletins
- Cancellations
- Contacts



WHAT'S NEW

DIRECT DEPOSIT STUBS

OSC will continue to mail Direct Deposit advices directly to all employees reduce handling and employee interactions. Please encourage your employees to opt out of receiving paper advice statements and instead access their statements on NYSPO.

For information on how to enroll your agency in the Direct Deposit Direct Mailing Program (DDDMP), allowing employees to continue receiving their direct deposit advices mailed directly, please see Payroll Bulletin No. 1025.

EXTENDED PAYSERV HOURS

Please refer to the PayServ Bulletin Board for updates to PayServ access.

UPCOMING DEADLINES

2021-2022 Agency Submission Schedule

Note: OSC Payroll will be accelerating the Confirm schedule on Wednesdays each week. This means that Certification issues that warrant direct deposit disables will need to be fixed no later than 10:00 am instead of the typical 1:00pm on Wednesdays.



Payroll Bulletins

FUN facts about Payroll Bulletins

- What ARE Payroll Bulletins?
- Where are new and existing Bulletins located?
- What kind of information is available in Payroll Bulletins?



Payroll Bulletins

What Are Payroll Bulletins?

- Released by OSC
- Contain pertinent payroll information or changes in policies and procedures
- Provide information and instructions to Agency Payroll Officers



Bulletin Topics Can Include:

- Upcoming Payments
- Changes to Payroll Processing Procedure
- Detailed information about system upgrades, etc.




Payroll Bulletins

Will contain:

- Subject
- Purpose
- Affected Employees
- Effective Dates
- OSC/Agency Action(s)
- Contact Information

PAYROLL BULLETIN
Office of the State Comptroller
Bureau of State Payroll Services



Payroll Bulletin No. 1877

Subject: Deferred Compensation Maximum Contribution Limits for Calendar Year 2021

Date Issued: December 4, 2020

Purpose:
The purpose of this bulletin is to notify agencies of the following maximum contribution limits for employees enrolled in the New York State Deferred Compensation Plan for calendar year 2021:

- The regular yearly contribution amount for Deferred Compensation will remain the same at \$19,500.00.
- An additional deferment available to employees age 50 and over remains unchanged at \$6,500.00. Employees in this age bracket can defer up to \$6,500.00 in addition to their regular contribution.
- The Deferred Compensation "Retirement Catch-Up" provision, available to employees in each of the last three years prior to normal retirement age remains unchanged at \$19,500 for a combined maximum total contribution of \$39,000.00 for calendar year 2021.

Employees are not eligible to choose both the "Retirement Catch-Up" and the "50 and Over Catch-Up" in the same calendar year.

Affected Employees:
Employees enrolled in the New York State Deferred Compensation Plan are affected.

Effective Dates:
Maximum salary contribution limits for the above referenced Deferred Compensation Plans are currently in effect.

Questions:
Questions regarding this bulletin may be directed to the [New York State Deferred Compensation Plan](#) or by calling the Nationwide Helpline at 1-800-422-8463. Representatives are available Monday – Friday, 8am – 11pm and Saturdays, 9am – 6pm.



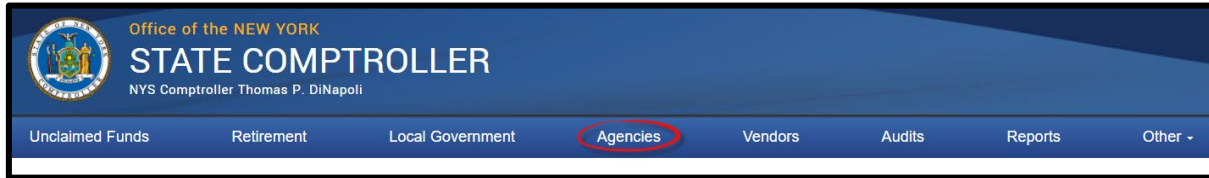
Payroll Bulletins

Bulletin Categories are located:

- OSC Internet Site – State Agencies
 - www.osc.state.ny.us/state-agencies/payroll

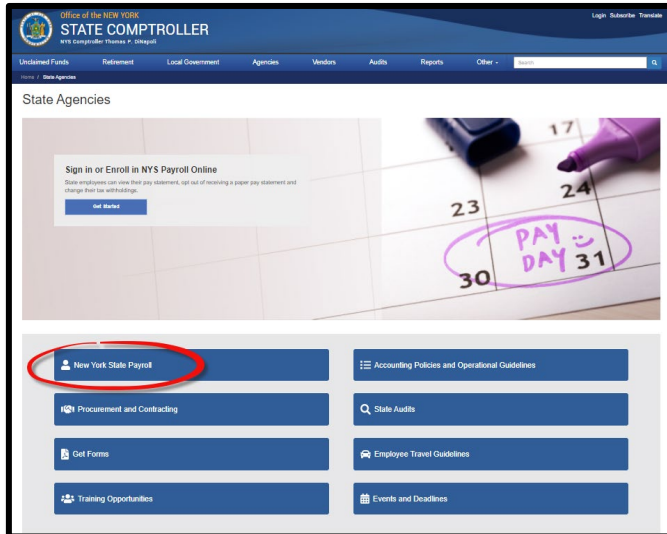


Payroll Bulletins



Office of the NEW YORK STATE COMPTROLLER
NYS Comptroller Thomas P. DiNapoli

Unclaimed Funds Retirement Local Government **Agencies** Vendors Audits Reports Other -



Office of the NEW YORK STATE COMPTROLLER
NYS Comptroller Thomas P. DiNapoli

Unclaimed Funds Retirement Local Government Agencies Vendors Audits Reports Other -

State Agencies

Sign in or Enroll in NYS Payroll Online
State employees can view their pay statement, opt out of receiving a paper pay statement and change their tax withholdings.

Get Started

New York State Payroll

Accounting Policies and Operational Guidelines
State Audits
Employee Travel Guidelines
Forms for State Agencies and Employers
Procurement and Contracting in New York

Training Opportunities
Events and Deadlines



Office of the NEW YORK STATE COMPTROLLER
NYS Comptroller Thomas P. DiNapoli

Unclaimed Funds Retirement Local Government Agencies Vendors Audits Reports Other -

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State Payroll Officers
Payroll Bulletins

- City University of New York
- Housing and Community Renewal
- Other Bulletins
- Payroll Improvement Project
- State Police
- State University of New York
- Transportation
- Unified Court System

Job Aids

- Payroll Calendars
- 2020-2021 Agency Submission Schedule
- 2021-2022 Agency Submission Schedule
- Forms
- PayStax
- Chart of Accounts Conversion
- Maintain My Payroll Contact Information
- W-2 Reprint Job Aid

Training

A list of upcoming PayServ and online training sessions, and recent presentations related to payroll services.

Payroll Users Group

The New York State Payroll Users Group, established in December 1999, is a partnership between the Office of the State Comptroller and the State Payroll Officers as a forum to improve payroll processing performance, address issues of mutual concern, and develop:

- Payroll Users Group Charter
- Meeting Archives
- Newsletters

Payroll Improvement Project (PIP) Bulletins

Payroll Improvement Project

Year Search

Bulletin #	Date ▼	Subject
No. PIP-018	04/21/21	New Additional Pay Earns Codes (V Codes) in PayServ
No. PIP-017	02/04/21	Post Production Support for PayServ 9.2
No. PIP-016	02/04/21	New and Changing Deduction Codes in PayServ 9.2
No. PIP-015	02/02/21	Direct Deposit Updated Business Process and AC 2772
No. PIP-014	02/01/21	ORP/VDC Arrears Deductions
No. PIP-013	01/12/21	Payroll Improvement Project Cutover Schedule and Trans
No. PIP-012	12/07/20	Changes to Mid-Pay Period Additional Pay
No. PIP-011	12/04/20	Changes to Savings Plans in PayServ 9.2
No. PIP-010	12/04/20	Changes to Pension Plans in PayServ 9.2



Payroll Bulletin No. PIP-008

What is Changing in PayServ Version 9.2

Pension Plans

Retirement Plans (except for ORP/VDC) will be migrated to Pension Plans in version 9.2. Data will be converted from existing records into Pension Plans (Benefits > Enroll In Benefits > USA-Pension Plans). There will be changes to the Retirement Plan Types and Benefit Plans. Specific crosswalks and information about these changes are covered in detail in [Payroll Bulletin PIP-010, Changes to Pension Plans in PayServ 9.2](#).

Savings Plans

ORP, VDC, and 403(b) plans will be migrated to Savings Plans in version 9.2. Data will be converted from existing records into Savings Plans (Benefits > Enroll In Benefits > Savings Plans). The 7Z – TIAA/CREF Plan Type will be updated to 4Z – Optional Retirement Plan (VDC) and there will be changes to Benefit Plans. All 403(b) deductions will be converted to Savings Plans and appear on the Savings Plans page as Plan Type 46 – 403(b). Specific crosswalks and detailed information about these changes will be covered in detail in [Bulletin PIP-011, Changes to Savings Plans in PayServ 9.2](#).

General Deductions

General Deductions (except 403(b)) will be converted and moved from the Create General Deductions Page to the General Deduction Data Page (Main Menu > Payroll for North America > Employee Pay Data USA > Deductions > General Deduction Data) for employees that are converted. There will be new deduction codes for ORP and VDC contributions, employee arrears, employer arrears, employee interest, and employer interest; these changes are described in [Bulletin PIP-011, Changes to Savings Plans in PayServ 9.2](#).



Retirement Plans Crosswalk

9.1 Value	9.2 Value	Description
7S	82	New York City Teachers Retirement System
7T	83	New York City Education Board Retirement System
7U	84	New York City Employee Retirement System
7W	85	Police and Fire Retirement System
7X	86	New York State Teachers Retirement System
7Y	87	New York State Employee Retirement System
7Z	4Z	ORP – converted to Savings Plans
7R	N/A	No Retirement Plan – will be retired upon conversion

Benefit Plans Crosswalk

9.1 BENEFIT PLAN	9.1 PLAN TYPE	9.2 BENEFIT PLAN	9.2 PLAN TYPE
NYTCA6	7S	NYTBT6	82
NYTCAA	7S	NYTAFT	82
NYTCAB	7S	NYTBEF	82
NYTCN6	7S	NYTBT6	82
NYTCNA	7S	NYTAFT	82
NYTCNB	7S	NYTBEF	82
NYTNC6	7S	NYTBT6	82
NYTNCA	7S	NYTAFT	82
NYTNCB	7S	NYTBEF	82
NBECA6	7T	NBEBT6	83
NBECAA	7T	NBEAFT	83
NBECAB	7T	NBEBEF	83
NBECN6	7T	NBEBT6	83
NBECNA	7T	NBEAFT	83
NBECNB	7T	NBEBEF	83
NYECA6	7U	NYEBT6	84
NYECAA	7U	NYEAFT	84
NYECAB	7U	NYEBEF	84
NYECN6	7U	NYEBT6	84
NYECNA	7U	NYEAFT	84
NYECNB	7U	NYEBEF	84



Agency Submission Schedule

The screenshot shows the website for the Office of the New York State Comptroller, Thomas P. DiNapoli. The page is titled 'New York State Payroll' and features a navigation menu with links for Unclaimed Funds, Retirement, Local Government, Agencies, Vendors, Audits, and Reports. A sidebar on the left contains links for Accounting Policies & Operational Guidance, Audits, Employee Travel Guidelines, Forms for State Agencies and Employees, New York State Payroll (highlighted), and Procurement and Contracting in New York. The main content area includes links for NYS Payroll Online, State Payroll Officers, Payroll Bulletins (with a list of agencies), and Job Aids (with a list of resources). The '2021-2022 Agency Submission Schedule' link is circled in red.

Office of the NEW YORK
STATE COMPTROLLER
NYS Comptroller Thomas P. DiNapoli

Unclaimed Funds Retirement Local Government Agencies Vendors Audits Reports

Home / State Agencies / New York State Payroll

Accounting Policies & Operational Guidance

Audits

Employee Travel Guidelines

Forms for State Agencies and Employees

New York State Payroll

Procurement and Contracting in New York

New York State Payroll

[NYS Payroll Online](#)
View your pay statement, opt out of receiving a paper pay statement and change your tax withholdings.

State Payroll Officers

Payroll Bulletins

- All State Agencies
- City University of New York
- Housing and Community Renewal
- Other Bulletins
- Payroll Improvement Project
- State Police
- State University of New York
- Transportation
- Unified Court System

Job Aids

- Payroll Calendars
- **2020-2021 Agency Submission Schedule**
- **2021-2022 Agency Submission Schedule**
- PERS
- PayServ
- Chart of Accounts Conversion
- Maintain My Payroll Contact Information
- W-2 Reprint Job Aid



Agency Submission Schedule

Payroll Period	Effective Dates	Check Date	Automated Interface Cutoff	On-Line Transactions Cutoff*	Time Entry File Submission Date	On-line Deductions, Taxes, Direct Deposit	Electronic Certification Submission Date	On - Line Back End Splits Submission Begin/End Dates	Reports/Files Available
Inst 16 Curr	10/21 - 11/3	11/4/2021	10/19/2021	10/20/2021	10/20/2021	10/14/2021 noon - 10/22/2021	10/26/2021	10/28 noon-10/29	10/29/2021
Inst 14 Extra Lag	9/30 - 10/13	11/4/2021	10/19/2021	10/20/2021	10/20/2021	10/14/2021 noon - 10/22/2021	10/26/2021	10/28 noon-10/29	10/29/2021
Admin 15 Lag	10/14 - 10/27	11/10/2021	10/26/2021	10/27/2021	10/27/2021	10/21/2021 noon - 10/29/2021	11/2/2021	11/4 noon-11/5	11/5/2021
Admin 16 Curr	10/28 - 11/10	11/10/2021	10/26/2021	10/27/2021	10/27/2021	10/21/2021 noon - 10/29/2021	11/2/2021	11/4 noon-11/5	11/5/2021
Admin 15 Extra Lag	10/7 - 10/20	11/10/2021	10/26/2021	10/27/2021	10/27/2021	10/21/2021 noon - 10/29/2021	11/2/2021	11/4 noon-11/5	11/5/2021
Inst 16 Lag	10/21 - 11/3	11/18/2021	11/1/2021	11/2/2021	11/2/2021	10/28/2021 noon-11/5/2021	11/9/2021	11/12/2021	11/12/2021
Inst 17 Curr	11/4 - 11/17	11/18/2021	11/1/2021	11/2/2021	11/2/2021	10/28/2021 noon-11/5/2021	11/9/2021	11/12/2021	11/12/2021
Inst 15 Extra Lag	10/14 - 10/27	11/18/2021	11/1/2021	11/2/2021	11/2/2021	10/28/2021 noon-11/5/2021	11/9/2021	11/12/2021	11/12/2021
Admin 16 Lag	10/28 - 11/10	11/24/2021	11/9/2021	11/10/2021	11/10/2021	11/4/2021 noon-11/12/2021	11/16/2021	11/18 noon-11/19	11/19/2021
Admin 17 Curr	11/11 - 11/24	11/24/2021	11/9/2021	11/10/2021	11/10/2021	11/4/2021 noon-11/12/2021	11/16/2021	11/18 noon-11/19	11/19/2021
Admin 16 Extra Lag	10/21 - 11/3	11/24/2021	11/9/2021	11/10/2021	11/10/2021	11/4/2021 noon-11/12/2021	11/16/2021	11/18 noon-11/19	11/19/2021
Inst 17 Lag	11/4 - 11/17	12/2/2021	11/15/2021	11/16/2021	11/16/2021	11/11/2021 noon-11/19/2021	11/23/2021	11/26/2021	11/26/2021
Inst 18 Curr	11/18 - 12/1	12/2/2021	11/15/2021	11/16/2021	11/16/2021	11/11/2021 noon-11/19/2021	11/23/2021	11/26/2021	11/26/2021
Inst 16 Extra Lag	10/28 - 11/10	12/2/2021	11/15/2021	11/16/2021	11/16/2021	11/11/2021 noon-	11/23/2021	11/26/2021	11/26/2021



POP QUIZ!

- Payroll Bulletins will tell you when a process changes and if there's a new "location" in PayServ, but will the bulletin give you the path?
- Are ALL Payroll Bulletins (new, old, and revised) available on OSC's website?
- Are valuable attachments available in Bulletins, such as calculators and crosswalks?



Pop Quiz Answers

YES, TO ALL!



New ORP/VDC Arrears Calculator

- Download Link and Instructions: [Payroll Bulletin No. PIP-014](#)

- Calculator Provides:
 - Employee / Employer Deduction Codes
 - Total Goal Amount
 - Flat Amount Deductions

Note: The Instructions tab details what to enter for each field.

ORP/VDC Arrears Calculator			
Employee ID		Arrears Begin Date	
Employee Record		Arrears End Date	
Current Benefit Plan		Arrears Benefit Plan	
Employee Election Date		Arrears EE Contribution %	
Current EE Contribution %		Arrears ER Contribution %	
Deduction Pay Periods		Total Pensionable Earnings	
	Deduction Code	Deduction/ Amount	Flat Total Owed/ Goal Amount
Employee Arrears			
Employer Arrears			
Check Date Owed	Pensionable Earnings	Total Pensionable Earnings (Sum of Check Pensionable Earnings)	
Calculator By Check Date		Instructions	+ -



Helpful Hint: Finding the Pensionable Earnings

Found on Review Paycheck Panel in PayServ:

- Main Menu > Payroll for North America > Payroll Processing USA > Produce Payroll > Review Paycheck
- Found at the bottom of the Paycheck Earnings tab.

The screenshot displays the 'Paycheck Earnings' tab in the PayServ system. It includes a header with fields for Emp# ID, Name, Company, Pay Group, Pay Period End (05/04/2021), Page, Line, and Separate Check. Below this is the 'Paycheck Information' section with fields for Paycheck Status (Confirmed), Paycheck Option (Advice), Issue Date, Paycheck Number, Off Cycle, Reprint, Adjustment, Corrected, and Cashed. To the right is the 'Paycheck Totals' section showing Earnings (2,822.55), Taxes (551.45), Deductions (337.49), and Net Pay (1,933.56).

The main 'Earnings' section shows a table with columns for Begin Date, End Date, Emp# Record, Benefit Record, Add'l Line Mtr, Reason, and Not Specified. Below this are three sub-sections: Salaried, Hourly, and Overtime, each with a table of Hours, Rate, and Earnings. The Salaried section shows 80.00 hours at a rate of 33.83951, resulting in earnings of 2,706.45. The Hourly section shows 0.00 hours at a rate of 0.000000, resulting in 0.00 earnings. The Overtime section shows 0.00 hours at a rate of 0.000000, resulting in 0.00 earnings.

Below the earnings sections are fields for State (NY), Locality, Rate Used (Hourly Rate), Shift (Not Applicable), and Shift Rate. There are also sections for 'Other Earnings' and 'Special Accumulators'. The 'Special Accumulators' section is highlighted with a blue arrow and shows a table with columns for Code, Description, Hours, Earnings, and Empl Record. The table contains one entry: Code '010', Description 'Tribal Interface', Hours '88.00', Earnings '2,822.55', and Empl Record '0'.



Helpful Hint: Finding the Pensionable Earnings

Special Accumulator Code 100: “All Pensionable Earnings”

Note: Pensionable Earnings may not be the same as the Gross Earnings. This is a reliable way to ensure that only arrears on actual pensionable earnings are being calculated.

The screenshot displays a payroll system interface with three main sections: Salaried, Hourly, and Overtime. Below these are fields for State (NY), Locality, Rate Used, Hourly Rate, Shift, and Not Applicable. The 'Other Earnings' section contains a table with columns for Code, Description, Rate Used, Hours, Rate, Amount, and Source. The 'Special Accumulators' section also contains a table with columns for Code, Description, Hours, Earnings, and Empl Record. The row for code 100, 'All Pensionable Earnings', is highlighted in yellow.

Code	Description	Rate Used	Hours	Rate	Amount	Source
99R	Hbr Cury Non-Adjnd Sac		80.00		2,822.55	0
100	All Pensionable Earnings		80.00		2,822.55	0
108	Retirement Service Credit Hrs		80.00		2,796.48	0
105	Perf Sac Acc		80.00		2,822.55	0
11R	Njt Cury Adjnd Sac		80.00		2,796.48	0
115	Unp Sac Acc		80.00		2,822.55	0
12R	Njt Cury Non-Adjnd Sac		80.00		2,822.55	0
125	SuryEdRisk Cylr Wages		80.00		2,822.55	0



ORP/VDC Participant Breaks in Service

- Using NBEN742a/NBEN742b
- Viewing Key Dates in PayServ
- Impact on ORP/VDC Members
- Calculating a Break
- Calculating New Dates




NBEN742a/NBEN742b

- Control-D report NBEN742 runs weekly
- Provides list of ORP/VDC members with a missing “projected 366 day completion date” and/or “projected 7 year completion date”
- Employees remain on report until the Suspense Panel is updated

NYS Office of the State Comptroller		
TIAA/CREF EMPLOYEES WITH ACTIVE JOBS AND NO PROJECTED DATES		
Report ID: NBEN742a		Page No. 1
As Of Date: 09/01/2016		Run Date 09/02/2016
		Run Time 02:13:06
28010 Emplid	SUNY@Albany Name	New Rate Indicator
[REDACTED]	[REDACTED]	Y

Viewing Key Dates in PayServ

Favorites ▾ Main Menu ▾ > Benefits ▾ > Enroll In Benefits ▾ > Suspense Page

 **PayServ - The NYS Payroll System**

Suspense Page

Employee ID: [REDACTED]

1 of 1 View All

Company: NYS

Adjusted Date of Hire: 01/16/2014 Override

Projected 366 Day Completion Date: 09/26/2015

Check Date Escrow Money Sent: 03/23/2016

Projected 7 Year Completion Date: [REDACTED]

Save Return to Search Notify Refresh

Impact on ORP/VDC Members

- Suspense Page
 - PayServ > Main Menu > Benefits > Enroll In Benefits > Suspense Page
- Projected 366 Day Completion Date - The end of suspense period
- Projected 7 Year Completion Date - When employer contribution percentage increases

Calculating a Break

- ORP Election Date from Savings Plans Page
 - PayServ > Main Menu > Benefits > Enroll In Benefits > Savings Plans
- Termination and Rehire Dates from Employee History Inquiry Page
 - PayServ > Main Menu > Workforce Administration > Administer Job Change Requests > Employee History Inquiry

Where to Find ORP Election Date

The screenshot displays the 'PayServ - The NYS Payroll System' interface. The breadcrumb trail at the top reads: Favorites > Main Menu > Benefits > Enroll In Benefits > Savings Plans. The user is identified as Thomas P. DiNapoli, State Comptroller.

Savings Plans

Employee ID: [REDACTED] Benefit Record Number: 0

Highly Compensated

Plan Type | 2 of 2 | View All

Plan Type: 4Z ORP/VDC

Coverage | 1 of 1 | View All

*Coverage Begin Date: 03/04/2021 | *Deduction Begin Date: 03/04/2021

Coverage Election

Elect | Terminate

*Election Date: 01/16/2014

Benefit Program: 08U United Univ Professors SUNY
Benefit Plan: T6SU08 SUNY ORP-T6-3.6PCT-ER8PCT

Option Code

Before Tax Investment

Percent of Earnings: 5.750

Buttons: Save, Return to Search, Notify, Refresh, Update/Display, Include History, Correct History



Where to Find Termination and Rehire Dates

Rehire →	01/15/2015	REH / ASU	95096360	ADJUNCT IN	01/23/2008		0.2500/ P	TERM	S	ADJUNCT INSTRUCTOR
	0	28200	95096360	980	0000	BIW	4	ALA	NBW	SUC@Old Westbury
	A	01/22/2015	15164	08			NYYYYYN	1.00	NYS	3014
Termination →	12/18/2014	TER / TER	95096360	ADJUNCT IN	01/23/2008	\$772.82	0.2500/ P	TERM	S	ADJUNCT INSTRUCTOR
	0	28200	95096360	980	0000	BIW	4	ALA	NBW	SUC@Old Westbury
	T	12/29/2014	15164	08		\$772.82	NYYYYYN	1.00	NYS	3014
	08/28/2014	PAY / SIC	95096360	ADJUNCT IN	01/23/2008	\$772.82	0.2500/ P	TERM	S	ADJUNCT INSTRUCTOR
	2	28200	95096360	980	0000	BIW	4	ALA	NBW	SUC@Old Westbury
	A	10/21/2014	15164	08		\$772.82	NYYYYYN	1.00	NYS	3014
	08/28/2014	PAY / RHS	95096360	ADJUNCT IN	01/23/2008	\$765.00	0.2500/ P	TERM	S	ADJUNCT INSTRUCTOR
	1	28200	95096360	980	0000	BIW	4	ALA	NBW	SUC@Old Westbury
	A	09/04/2014	15164	08		\$765.00	NYYYYYN	1.00	NYS	3014
Rehire →	08/28/2014	REH / ASU	95096360	ADJUNCT IN	01/23/2008		0.2500/ P	TERM	S	ADJUNCT INSTRUCTOR
	0	28200	95096360	980	0000	BIW	4	ALA	NBW	SUC@Old Westbury
	A	09/04/2014	15164	08			NYYYYYN	1.00	NYS	3014
Termination →	05/08/2014	TER / TER	95096360	ADJUNCT IN	01/23/2008	\$687.50	0.2500/ P	TERM	S	ADJUNCT INSTRUCTOR
	0	28200	95096360	980	0000	BIW	4	ALA	NBW	SUC@Old Westbury
	T	05/16/2014	15164	08		\$687.50	NYYYYYN	1.00	NYS	3014
Election Date Start Here →	01/16/2014	PAY / RHS	95096360	ADJUNCT IN	01/23/2008	\$687.50	0.2500/ P	TERM	S	ADJUNCT INSTRUCTOR
	2	28200	95096360	980	0000	BIW	4	ALA	NBW	SUC@Old Westbury
	A	05/01/2014	15164	08		\$687.50	NYYYYYN	1.00	NYS	3014



Breaks in Service Process Overview

- Breaks in Service Calculator
 - Bulletin 1665 Calculating “Projected 366 Day Completion Date” and/or “Projected 7 Year Completion Date” for Optional Retirement Program (ORP) and Voluntary Defined Contribution (VDC) Members, Plan Type 4Z”
 - Updated calculator
 - ORP-VDC Breaks Calculator.xltx
- Agency Action Items
 - View NBEN742
 - Calculate 366 date and 7 year dates
 - Complete the New ORP/VDC Breaks in Service Spreadsheet
 - Send via email to payrollretirement@osc.ny.gov for review
- OSC Action Items
 - Review calculations
 - Update Suspense Page in PayServ

Calculating an Employee's Breaks

- Repeat these steps, entering each break in service until the end of the employee's history
- The Calculated Days on Leave and Adjusted Hire Date / New Election Dates update as rows are added

<u>Name</u>		Jane Doe	
<u>EMPLID</u>		N00000000	
<u>Record(s)</u>		0	
<u>Election Date</u>		1/16/2014	
<u>Original 366</u>	<u>Original 7</u>	<u>Date</u>	<u>Year Date</u>
		1/16/2015	1/16/2021
<u>Comments</u>			
<u>Termination</u>	<u>Rehire Date</u>	<u>Calculated</u>	<u>Adjusted Hire</u>
<u>Date</u>	<u>Date</u>	<u>Days on</u>	<u>Date / New</u>
		<u>Leave</u>	<u>Election Date</u>
5/8/2014	8/28/2014	112	5/8/2014
12/18/2014	1/15/2015	28	6/5/2014
5/7/2015	8/27/2015	112	9/25/2014
12/17/2015	1/14/2016	28	10/23/2014
5/5/2016	8/25/2016	112	2/12/2015
12/15/2016	1/12/2017	28	3/12/2015
5/4/2017	6/29/2017	56	5/7/2015
7/13/2017	9/1/2017	50	6/26/2015
		0	6/26/2015
		0	6/26/2015
		0	6/26/2015
		0	6/26/2015
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		0	6/26/2015
		0	6/26/2015
		0	6/26/2015
		0	6/26/2015

Summary Employee1 Employee2 Employee3

Calculating an Employee's Breaks

- When finished entering all of the breaks, the total number of days on leave as well as the New Adjusted Hire Date are visible

12/17/2015	1/14/2016	28	10/23/2014
5/5/2016	8/25/2016	112	2/12/2015
12/15/2016	1/12/2017	28	3/12/2015
5/4/2017	6/29/2017	56	5/7/2015
7/13/2017	9/1/2017	50	6/26/2015
		0	6/26/2015
		0	6/26/2015
		0	6/26/2015
		0	6/26/2015
		0	6/26/2015
		0	6/26/2015
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		0	6/26/2015
		0	6/26/2015
		526	6/26/2015

Summary Employee1 Employee2 Employee3

Calculating an Employee's Breaks

- The Summary tab will show final results for each employee entered
- Email complete workbook to: payrollretirement@osc.ny.gov

Department ID	Payroll Representative		Date Submitted	
Employee ID	Employee Record	Employee Name	Original Election Date	Adjusted Hire Date/New Election Date
N00000000	0	Jane Doe	1/16/2014	6/26/2015
				1/0/1900
				1/0/1900
				1/0/1900
				1/0/1900
				1/0/1900
				1/0/1900
				1/0/1900
				1/0/1900
				1/0/1900
				1/0/1900
				1/0/1900
				1/0/1900
				1/0/1900
				1/0/1900
				1/0/1900
				1/0/1900

OSC Actions

OSC will contact you and return the spreadsheet for corrections if discrepancies are discovered. OSC Payroll Deductions staff will update the Suspense Page in PayServ from the agency submitted spreadsheet. PayServ will update any unmet dates based on the Adjusted Hire Date from the calculator.

The screenshot shows the 'Suspense Page' in the PayServ system. At the top, there are navigation tabs: Favorites, Main Menu, Benefits, Enroll In Benefits, and Suspense Page. Below the navigation is the system title 'PayServ - The NYS Payroll System' and a 'Suspense Page' button. A search bar is present with the text 'Employee ID:'. Below the search bar is a table with one entry. The table has columns for Company, Adjusted Date of Hire, Projected 366 Day Completion Date, Check Date Escrow Money Sent, and Projected 7 Year Completion Date. The 'Projected 7 Year Completion Date' is highlighted in yellow. There is also an 'Override' checkbox which is checked. At the bottom of the page are buttons for 'Save', 'Return to Search', 'Notify', and 'Refresh'.

Company	Adjusted Date of Hire	Projected 366 Day Completion Date	Check Date Escrow Money Sent	Projected 7 Year Completion Date
NYS	06/26/2015	09/26/2015	03/23/2016	06/26/2022



What Stayed the Same?

What in 9.2 is the same as 9.1?

- Contribution & Arrears Deduction codes for:
 - NYS & NYCERS and Police & Fire
 - NYS & NYCTRS
 - NYCBOE
- Arrears are still entered in General Deductions Data

9.1 to 9.2


Changes Entering Retirement Selections

- Retirement Plans panel (Obsolete)
 - USA Pension Plans
 - Savings Plans
 - ORP Arrears
- Retirement Option 7R (gone)



Retirement Plans Panel

Favorites ▾ Main Menu ▾ > Benefits ▾ > Enroll In Benefits ▾ > Retirement Plans

 PayServ - The NYS Payroll System Thomas P. DiNapoli, State Comptroller

Retirement Plans

Employee ID NO: [REDACTED] Benefit Record Number 0

Plan Type 7Y OBSOLETE 9.1 Emp's Rtmt Sys

Coverage

Deduction Begin Date 03/04/2021 Elect Waive ● Terminate Election Date 08/12/2004

Benefit Program 06M Management Confidential Payroll Status Active

Benefit Plan Option Code

Save Return to Search Notify Refresh Update/Display Include History

Retirement Plans Panel ERS & ORP

PayServ - The NYS Payroll System Thomas P. DiNapoli, State Com

Retirement Plans

Employee ID NO [REDACTED] Benefit Record Number 0

Plan Type 1 of 1 View All

Plan Type 7Y OBSOLETE 9.1 Emp's Rlmt Sys

Coverage 2 of 4 View All

Deduction Begin Date 06/21/2012
Participation Election Elect Waive Terminate Election Date 08/12/2004

Benefit Program 02C CSEA Administrative Unit Payroll Status Active
Benefit Plan **ERSAFT** ERS After Tax Option Code

PayServ - The NYS Payroll System Thomas P. DiNapoli, State Com

Retirement Plans

Employee ID NO [REDACTED] Benefit Record Number 0

Plan Type 1 of 1 View All

Plan Type 7Z OBSOLETE 9.1 TIAA/CREF

Coverage 2 of 3 View All

Deduction Begin Date 03/15/2012
Participation Election Elect Waive Terminate Election Date 03/17/2011

Benefit Program 08U United Univ Professors SUNY Payroll Status Active
Benefit Plan **T5SNYB** TIA Tier 5 NRI Sny Educ Bef Tx Option Code

Where Did Everything Go?

Payroll Bulletin PIP-010 - Changes to Pension Plans in PayServ 9.2

- USA Pension Plans
 - NYSERS & Police and Fire (IF requested by NYSLRS)
 - NYCERS
 - NYC and NYS TRS
 - NYC BOE

USA Pension Plans

Plan Type

*Plan Type

Coverage

*Deduction Begin Date *Election Date 07/22/2021

Coverage Election

Elect Waive Terminate

Benefit Program 13M Management Confidential SUNY *Registration Nbr

Benefit Plan

Option Code

Voluntary Contributions

Flat Amount Contribution \$0.00 Or Total Contribution 0.000

Salary for Pension Calculation Payroll Status Active

Election Options

Option Code	Description	Percentage
1		

Look Up Plan Type

Cancel

Search Results

View 100 1-6 of 6

Plan Type	Translate Long Name
82	New York City Teacher's Rtrmnt
83	New York City Education Board
84	New York City Employees Rtrmnt
85	Police and Fire Retirement Sys
86	Teacher's Retirement System
87	Employee's Retirement System



USA Pension Plans

Plan Type

*Plan Type

Coverage

*Deduction Begin Date *Election Date 07/22/2021

Coverage Election

Elect Waive Terminate

Benefit Program *Registration Nbr

Benefit Plan

Option Code

Voluntary Contributions

Flat Amount Contribution \$0.00 Or Total Contribution 0.000

Salary for Pension Calculation Payroll Status Active

Election Options

Option Code	Description	Percentage		
1		<input type="text"/>	+	-



ORP/VDC and 403b

Savings Plan Panel

- OPR/VDC = Plan Type 4Z
- 403(b) = Plan Type 46
- Deferred Compensation = Plan Type 49



ORP/VDC in Savings Plan Panel

Adding a New Row

The screenshot shows the 'Savings Plans' panel. At the top, there are fields for 'Employee ID' and 'Benefit Record Number 0'. Below this, there is a 'Plan Type' section with a search box containing the text '*Plan Type' and a magnifying glass icon. A red arrow points to this search box. To the right of the search box are '+' and '-' buttons. Below the 'Plan Type' section is a 'Coverage' section with fields for '*Coverage Begin Date' and '*Deduction Begin Date'. Further down, there is a 'Coverage Election' section with radio buttons for 'Elect' (selected) and 'Terminate', and a field for '*Election Date' set to '07/22/2021'. At the bottom, there are sections for 'Benefit Program' (06M), 'Management Confidential', and 'Benefit Plan' with a search box. The bottom-most section is divided into 'Before Tax Investment' and 'After Tax Investment', each with fields for 'Flat Amount' and 'Percent of Earnings'.

Plan Type Options

The screenshot shows a 'Look Up Plan Type' dialog box. At the top, it says 'Benefit Record Number 0'. Below this, there is a 'Cancel' button and a 'Help' link. The main area is titled 'Search Results' and shows 'View 100' and '1-4 of 4' items. Below this is a table with two columns: 'Plan Type' and 'Translate Long Name'. The table contains the following data:

Plan Type	Translate Long Name
46	403(b)
48	Employer Only
49	Section 457
4Z	ORP/VDC



ORP/VDC Plan Type 4Z

Savings Plans

Savings Plans

Employee ID [REDACTED] Benefit Record Number 0

Highly Compensated

Plan Type 2 of 2 | View All

*Plan Type 4Z ORP/VDC

Coverage 1 of 1 | View All

*Coverage Begin Date [REDACTED] *Deduction Begin Date [REDACTED]

Coverage Election

Elect Terminate *Election Date 07/22/2021

Benefit Program

Benefit Plan [REDACTED]

Option Code

Before Tax Investment

Percent of Earnings [REDACTED]



Benefit Plans

Savings Plans

Savings Plans
Employee ID [REDACTED] Benefit Record Number 0

Highly Compensated

Plan Type ORP/VDC

Coverage View All

*Coverage Begin Date *Deduction Begin Date

Coverage Election
 Elect Terminate *Election Date

Benefit Program

Benefit Plan

Option Code

Before Tax Investment
Percent of Earnings

Look Up Benefit Plan

Cancel

Search Results

View 100 1-20 of 20

Benefit Plan	Description
CNYSUS	CUNY ORP SUSPENSE - 3-6 PCT
SNYSUS	SUNY ORP SUSPENSE 3-6 PCT
T2CUAX	CUNY ORP - T3 -10 YR
T2SUAX	SUNY OPR-T2-10 YR
T3CUBX	CUNY ORP - T3 -10 YR



ORP Arrears

Employee AND Employer

- Agencies have always been required to calculate and enter employee arrears but now also need to calculate and enter employer arrears.



Entering 403b in Savings Plan Panel

Savings Plans

Savings Plans Employee ID Benefit Record Number 0

Highly Compensated

Plan Type

Coverage

*Coverage Begin Date *Deduction Begin Date

Coverage Election

Elect Terminate *Election Date 07/22/2021

Benefit Program 06M Management Confidential

Benefit Plan

Option Code

Before Tax Investment Flat Amount

Percent of Earnings

After Tax Investment Flat Amount

Percent of Earnings

Benefit Record Number 0

Look Up Plan Type [Help](#)

Search Results

View 100

Plan Type	Translate Long Name
46	403(b)
48	Employer Only
49	Section 457
4Z	ORP/VDC



Plan Type 46

Savings Plans

Savings Plans

Employee ID [REDACTED] Benefit Record Number 0

Highly Compensated

Plan Type 2 of 3 | [View All](#)

*Plan Type 46 403(b)

Coverage 1 of 1 | [View All](#)

*Coverage Begin Date [REDACTED] *Deduction Begin Date [REDACTED]

Coverage Election

Elect Terminate *Election Date 07/22/2021

Benefit Program [REDACTED]

Benefit Plan [REDACTED]

Option Code [REDACTED]

Before Tax Investment	After Tax Investment
Flat Amount [REDACTED]	Flat Amount [REDACTED]
Percent of Earnings [REDACTED]	Percent of Earnings [REDACTED]



Benefit Plan for Plan Type 46

Savings Plans

Savings Plans
Employee ID

Highly Compensated

Plan Type 403(b)

Coverage
*Coverage Begin Date *Deduction Begin Date

Coverage Election
 Elect Terminate

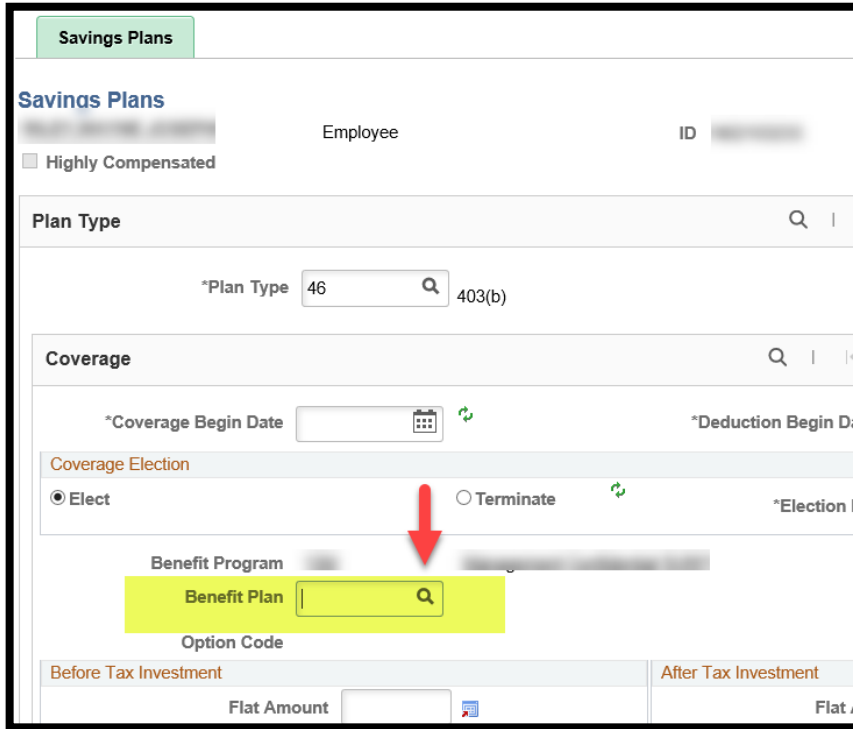
Benefit Program

Benefit Plan

Option Code

Before Tax Investment After Tax Investment

Flat Amount Flat



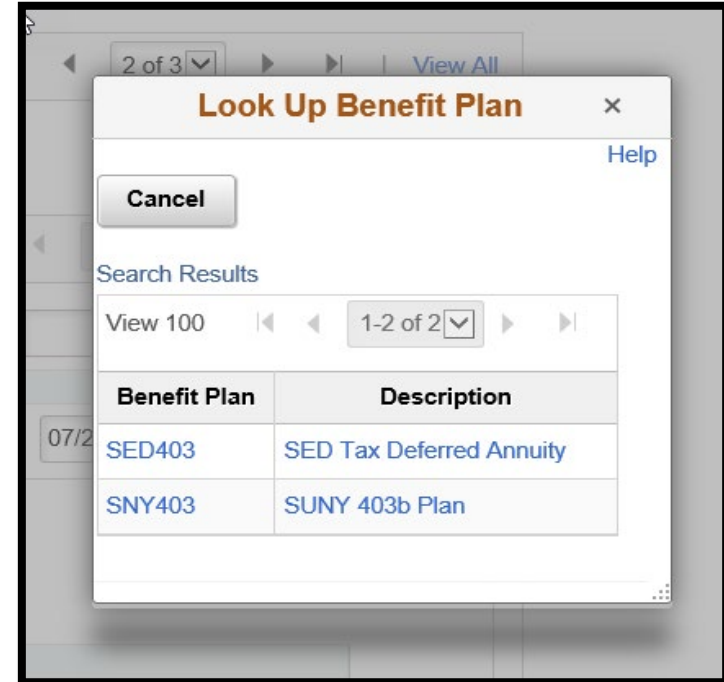
Look Up Benefit Plan

Cancel

Search Results

View 100 1-2 of 2

Benefit Plan	Description
SED403	SED Tax Deferred Annuity
SNY403	SUNY 403b Plan



Savings Plan Panel

Deferred Comp Section 457

Savings Plans

Savings Plans

Employee ID [REDACTED] Benefit Record Number 0

Highly Compensated

Plan Type 49 Section 457

Coverage

*Coverage Begin Date 01/07/2021 *Deduction Begin Date 01/07/2021

Coverage Election

Elect Terminate *Election Date 01/07/2021

Benefit Program 06M Management Confidential

Benefit Plan OSC457 Deferred Comp

Option Code

Before Tax Investment

Percent of Earnings 8.000 WC Leave

After Tax Investment

Percent of Earnings



Fall Conference

Q & A

PayrollRetirement@osc.ny.gov

