Workers’ Compensation in PayServ

Presented by:
Mara Koster, Christine Lombard, and Ruth Belschwinder
What We’ll Cover

• WC Tax Exclusions & Prior and Current Year Tax Clean Ups
• WC Supplemental Payments
• Changes to Incident and Injury Detail Requirement
WC Tax Exclusions & Prior and Current Year Tax Clean Ups
IRS Publication 525

• “Amounts you receive as workers' compensation for an occupational sickness or injury are fully exempt from tax if they're paid under a workers' compensation act or a statute in the nature of a workers' compensation act.”

• “Return to work. If you return to work after qualifying for workers' compensation, salary payments you receive for performing light duties are taxable as wages.”
WC Taxes for NYS Employees

1. Agency places employee on WC leave in PayServ
2. WC Exclusion programs review the WC Leaves panel for employees on WC leave
   - Programs run on a six-week lag to allow for late entry of WC leave transactions
3. Programs reduce taxable gross earnings for three categories:
   - WFA – Federal Taxes
   - WSA – State Taxes
   - WSM – FICA taxes (Social Security & Medicare)
4. Refunds are calculated based on the taxability of the exclusion
5. Checks are issued for each tax category
# The Six Week Lag

## 2022 WC Tax Refund Dates

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WC Leaves Page
Payroll for North America > Employee Data USA > Employee Workers Comp Leaves

Processing Status: Closed
*Effective Date: 11/18/2021
End Date: 11/23/2021
WC Cancelled?: 
Action: Paid Leave of Absence

Reason: Workers Comp Leave Full
*Schedule at Leave: NYYYYYN
Schedule Changed?:
Incident Nbr: 00174551
Incident Date: 03/04/2021
Dept ID: 10610
BU at Injury: 01

View Msgs
Full Exclusion WC Earnings Exclusion

Payroll for North America > Employee Data USA > Worker Comp Earning Exclusions

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**Total Earnings:** 3088.08
**WC Exclusion:** 3088.08

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Full Exclusion WC Pre-Tax Deds Tab

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- **Pay Begin Date:** 02/24/2022
- **Company:** NYS
- **Pay Group:** IL5
- **Pay End Date:** 03/09/2022
- **Total Earnings:** $3088.08
- **WC Exclusion:** $3088.08

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Full Exclusion WFA Check

[Image of a paycheck check with highlighted details]

**Paycheck Totals**
- Earnings: 0.00
- Taxes: -286.62
- Deductions: 0.00
- Net Pay: 286.62

**Earnings**
- Begin Date: 04/20/2022
- End Date: 04/20/2022
- Addl Line Nbr: 3
- Reason: Not Specified

**Salaried**
- Hours: 0.00
- Rate: 33.504925
- Earnings: 0.00

**Hourly**
- Hours: 0.00
- Rate: 0.000000
- Earnings: 0.00

**Overtime**
- Hours: 0.00
- Rate: 0.000000
- Earnings: 0.00

**Other Earnings**
- Code: WFA
- Description: Workers Comp Federal Wages Adj
- Hourly Rate
- Data Used: Hourly
- Rate: 0.000000
- Amount: -3.020.23

[Diagram of paycheck check with highlighted details]
### Partial Exclusion WC Earnings Exclusion

#### Pay Check Information
- **Issue Date:** 06/16/2022
- **Pay Begin Date:** 05/19/2022
- **Pay End Date:** 06/01/2022
- **Company:** NYS
- **Pay Group:** L8
- **Paycheck Status:** Confirmed
- **Paycheck Option:** Check
- **Form ID:** KEYCHK
- **Check Nbr:** 420-44302

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Partial Exclusion WC Pre-Tax Deds

Total Earnings: 1758.21
WC Exclusion: 430.31

NYS Comptroller
Thomas P. DiNapoli
Partial Exclusion WSA Check
# WC Exclusions & Retro Pay WC Earnings Exclusion

**Pay Check Information**
- **Issue Date:** 06/05/2022
- **Pay Begin Date:** 05/12/2022
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- **Total Earnings:** 10007.81
- **WC Exclusion:** 114.83

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WC Exclusion & Retro WSM Check

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- Issue Date: 07/20/2022
- Pay Period End: 07/06/2022
- Paycheck Number: Blacked out
- Paycheck Option: Check
- Paycheck Totals:
  - Earnings: 0.00
  - Taxes: -8.79
  - Deductions: 0.00
  - Net Pay: 8.79

**Earnings**
- Salaried:
  - Hours: 0.00
  - Rate: 34.572660
  - Earnings: 0.00
- Hourly:
  - Hours: 0.00
  - Rate: 0.000000
  - Earnings: 0.00
- Overtime:
  - Hours: 0.00
  - Rate: 0.000000
  - Earnings: 0.00

**Other Earnings**
- Code: WSM
  - Description: Workers Comp SS/Med Wages Adj
  - Rate Used: Hourly Rate
  - Hours: 0.00
  - Rate: 0.000000
  - Amount: -114.83
Prior Year WC “Clean Ups”

Programs run to correct prior year taxable gross for employees with WC leaves

- **Two reasons for these corrections**
  - Changes to WC leave in prior year
  - Clean up for final three checks

- **Issues corrected by W-2 Cs**
  - New WC leave causes decrease in taxable gross
  - Cancelled WC leave causes increase to taxable gross
  - Adjusts taxable gross for Federal/State/FICA

- **Generates FICA refunds or deficiencies as needed**
  - Refunds if taxable gross decreased
  - Deficiencies if taxable gross increased

- **Statute of Limitations** — 3 years, 3 months, 15 days
### First Prior Year Clean Up WC Earnings Exclusion

**Total Earnings:** 2538.46  
**WC Exclusion:** 1015.39

#### Pay Check Information

- **Issue Date:** 12/16/2021  
- **Pay Begin Date:** 11/18/2021  
- **Company:** NYS  
- **Pay Group:** IL1  
- **Pay End Date:** 12/01/2021  
- **Check Number:** [Redacted]  
- **OK To Process:**

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First Prior Year Clean Up WC Pre-Tax Deds Tab

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- Pay Begin Date: 11/18/2021
- Pay End Date: 12/01/2021
- Company: NYS
- Pay Group: IL1
- Empl ID: [Redacted]
- Empl Record: 0
- Name: [Redacted]

Total Earnings: 2538.46
WC Exclusion: 1015.39

Pay Check Pre-Tax Deduction Information
- Plan Type: General
- Ded Cd: HIBTRG
- Description: Regular Before Tax Health
- FICA Effect: Subtracts

Pay Check Tax

Taxable Wage Adj

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Prior Year FICA Refunds

• Clean Up Programs calculate refunds
• PayServ Bulletin Board message is posted
• NTAX722 report lists employees with calculated refunds
• Agency completes AC3206 form for each employee
• Agency collects signed AC3206 forms
• Agency selects the “Refund Consent Received” box for all employees with signed forms
Refund Consent?

Payroll for North America > U.S. Annual Processing > W-2 Adjustments > Update Emp W2C AC-3206 Status

Emp W2C AC-3206

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<td></td>
</tr>
</tbody>
</table>

W-2c Batch Number: 2083  
Year: 2021

AC-3206 Status

- Refund Consent Received?  
  Certificate Received Date: 
  W2C Batch Stat: IRS Refunds Processed

W2C FICA Information

| W2C Deptid: 10390  
Mohawk Correctional Facility  
T/E Deptid: | Previous Amount | Current Amount | Change |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>03 Social Security Wages</td>
<td>90,235.30</td>
<td>80,270.44</td>
<td>-9,964.86</td>
</tr>
<tr>
<td>04 Social Security Tax Withheld</td>
<td>5,594.59</td>
<td>4,976.77</td>
<td>-617.82</td>
</tr>
<tr>
<td>05 Medicare Wages and Tips</td>
<td>90,235.30</td>
<td>80,270.44</td>
<td>-9,964.86</td>
</tr>
<tr>
<td>06 Medicare Tax Withheld</td>
<td>1,308.41</td>
<td>1,163.92</td>
<td>-144.49</td>
</tr>
</tbody>
</table>

Total Refund: 762.31

Reason for Tax Refund: Workers’ Comp
Prior Year FICA Deficiency Process

• Clean Up programs calculate amount owed
• OSC enters General Comments
  o Providing two full pay periods of notice prior to start of collection
• Agency informs employee of impending deduction
• OSC enters 502 FICA deficiency
  o 10% for active employees
  o 100% for inactive
• PayServ collects until satisfied
What about those $0.00 refund checks?

- Regularly Processed WC Tax Refunds
  - Refunds are not equivalent to what was initially withheld
  - PayServ refunds taxes by determining how much the amount being excluded *would have been taxed*
  - If the amount being refunded would not have been taxed, the system doesn’t calculate a tax refund, and a $0.00 check is generated

- Other reasons for $0.00 refund checks include:
  - Modified Leaves
  - WC Exclusions on Negative Retro
$0.00 Checks WC Pre-Tax Deds
$0.00 Checks WFA Check

Paycheck Information:
- Paycheck Status: Confirmed
- Issue Date: 06/16/2022
- Paycheck Option: Check
- Paycheck Number: [Redacted]
- Off Cycle: No
- Reprint: No
- Adjustment: No
- Corrected: No
- Cashed: No

Paycheck Totals:
- Earnings: $0.00
- Taxes: $0.00
- Deductions: $0.00
- Net Pay: $0.00

Earnings:
- Begin Date: 06/01/2022
- End Date: 06/01/2022
- Addl Line Nbr: 3
- Reason: Not Specified

Salaried:
- Hours: 0.00
- Rate: 20.984135
- Earnings: 0.00

Hourly:
- Hours: 0.00
- Rate: 0.000000
- Earnings: 0.00

Overtime:
- Hours: 0.00
- Rate: 0.000000
- Earnings: 0.00

Other Earnings:
- Code: WFA
- Description: Workers Comp Federal Wages Adj
- Rate Used: Hourly Rate
- Hours: [Not Applicable]
- Rate: [Not Applicable]
- Amount: -$506.21

Other Earnings Details 1:

Other Earnings Details 2:
Current Year WC Clean Ups

• 3 Per Year
  o June
  o September
  o December
• Taxable Gross Adjustments
  o Federal
  o State
  o Local
  o Social Security
  o Medicare
• Tax Balance Adjustments
  o Social Security
  o Medicare
Current Year WC Clean Ups

• PayServ Bulletin Board message is posted
• Control-D report NBEN543B lists employees with 502 FICA Deficiencies
  o Employee Notification
• FICA Refunds issued in paychecks
Supplemental Payments
Processing Supplemental Payments

• NYSIF sends award information to OSC
• Many payments calculate and load automatically to PayServ
• Some payments require review
  o Clean Payments
  o Unresolved Payments
  o Recaps
Calculating Supplemental Payments

NYSIF weekly award is $875.88
Paying 8 days so the award is: $700.70

$1787.92 Biweekly Comp Rate
+ $116.07 Addl. Pays (LOC PAY)
/ 10 Days 10 Days
= $190.40 Daily Comp Rate
* 8 Number of Days Awarded by NYSIF
= $1523.19 Total Pre-Injury Gross Biweekly for 8 Days
* .60 (60%) .60 (60%)
= $913.92 60% of Pre-injury Gross Biweekly for 8 Days

NYSIF Award of $700.70 < $913.92
Employee is Entitled to Supplement = $213.22
Calculating Supplemental Payments

NYSIF weekly award is $1063.05
Paying 5 days so the award is: $531.53

$1496.86  Biweekly Comp Rate

$0.00  Employee has No Additional Pays

10 Days  10 Days

$149.69  Daily Comp Rate

5  Number of Days Awarded by NYSIF

$748.43  Total Pre-Injury Gross Biweekly for 5 Days

.60 (60%)  .60 (60%)

$449.06  60% of Pre-injury Gross Biweekly for 5 Days

NYSIF Award of $531.53 > $449.06
Employee is NOT Entitled to Supplement
WC Data Simple Example

Payroll for North America > Employee Pay Data USA > Workers Compensation Data

**WC Comp Data**

- **Employee ID:** [redacted]
- **Name:** [redacted]
- **Empl Record:** 0
- **Department:** 25000
- **Company:** NYS
- **Pay Group:** AL4

**Pay End Date:** 08/03/2022

- **Claim Number:** 073681249
- **SIF Award:** $1620.52
- **Supplement Earn Code:** WPS
- **Earnings Begin Date:** 06/29/2022
- **Earnings End Date:** 07/12/2022
- **Supplement Amount:** 0.00
- **Supplement Days:** 10.00

**WC Claim Type:** Standard

- **Total Supplement Days:** 15.00

**Retirement Salary:** 2430.77

**Service Days:** 10.00

**Date of last update:** 08/08/2022
WC Claims Supplement Simple Example

Payroll for North America > Employee Pay Data USA > Workers Comp Claims Supplement

ID: [Redacted]  Name: [Redacted]

**WC Claims Days Adj**

*Claim Number:* 073681249  
*Accident Date:* 04/22/2022  
Department: 25000  
Office of Child & Family Serv.

**Claim Type**

- Standard
- Apportioned
- Combined

**Projected Supplement End Date:** 01/20/2023

**Supp Days in WC Tran Data:** 10.00
**Supp Days Adjustments:** 5.00
**Total Supplement Days:** 15.00

**Supplemental Days Adjustments**

<table>
<thead>
<tr>
<th>Seq#</th>
<th>Days Adj</th>
<th>Adj Reason</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>Worked</td>
<td>042322-062122</td>
</tr>
<tr>
<td>2</td>
<td>5.00</td>
<td>Accr Chgc</td>
<td>062222-062822</td>
</tr>
</tbody>
</table>

**Last Updated By**

- 08/01/2022 9:16:44AM

[Image of a screenshot showing the WC Claims Supplement interface with highlighted sections showing the claim number, accident date, and supplemental days adjustments]
WC Data  < 51% Example

<table>
<thead>
<tr>
<th>WC Comp Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee ID:</td>
</tr>
<tr>
<td>Empl Record:</td>
</tr>
<tr>
<td>Company:</td>
</tr>
<tr>
<td>Name:</td>
</tr>
<tr>
<td>Department:</td>
</tr>
<tr>
<td>Pay Group:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>WC Claim Type:</th>
<th>Standard</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay End Date:</td>
<td>08/03/2022</td>
</tr>
<tr>
<td>Claim Number:</td>
<td>073560088</td>
</tr>
<tr>
<td>SIF Award:</td>
<td>$6191.37</td>
</tr>
<tr>
<td>WC Claim Type:</td>
<td>Standard</td>
</tr>
<tr>
<td>Total Supplement Days:</td>
<td>73.00</td>
</tr>
<tr>
<td>Retirement Salary:</td>
<td>7213.55</td>
</tr>
<tr>
<td>Service Days:</td>
<td>45.00</td>
</tr>
<tr>
<td>Last Updated By:</td>
<td>NPAY537</td>
</tr>
<tr>
<td>Date of last update:</td>
<td>08/08/2022</td>
</tr>
</tbody>
</table>
WC Claims Supplement < 51% Example

### WC Claims Days Adj

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### WC Claims

- **Claim Number:** 073560088
- **Accident Date:** 04/03/2022
- **Department:** 28390
- **Projected Supplement End Date:** 01/01/2023

#### Claim Type

- **Standard**
- **Apportioned**
- **Combined**

#### Supplemental Days Adjustments

<table>
<thead>
<tr>
<th>Seq#</th>
<th>Days Adj</th>
<th>Adj Reason</th>
<th>Comments</th>
<th>PR297</th>
<th>Last Updated By</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>5.00</td>
<td>Accr Chgd</td>
<td>4/4/22 - 4/10/22</td>
<td></td>
<td>08/01/2022 4:20:13PM</td>
</tr>
<tr>
<td>2</td>
<td>23.00</td>
<td>&lt;51% Dis</td>
<td>4/11/22 - 5/11/22</td>
<td>297</td>
<td>08/01/2022 4:20:13PM</td>
</tr>
</tbody>
</table>

#### Supp Days in WC Tran Data:
- 45.00

#### Supp Days Adjustments:
- 28.00

#### Total Supplement Days:
- 73.00
<table>
<thead>
<tr>
<th>Supplement Days</th>
<th>10.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay End Date</td>
<td>07/27/2022</td>
</tr>
<tr>
<td>Claim Number</td>
<td>072829963</td>
</tr>
<tr>
<td>SIF Award</td>
<td>$1390.54</td>
</tr>
<tr>
<td>Supplement Earn Code</td>
<td>WPS</td>
</tr>
<tr>
<td>Earnings Begin Date</td>
<td>06/10/2022</td>
</tr>
<tr>
<td>Earnings End Date</td>
<td>06/30/2022</td>
</tr>
<tr>
<td>Supplement Amount</td>
<td>0.00</td>
</tr>
<tr>
<td>Retirement Salary</td>
<td>2615.64</td>
</tr>
<tr>
<td>Service Days</td>
<td>15.00</td>
</tr>
<tr>
<td>OK to Pay</td>
<td></td>
</tr>
<tr>
<td>Date of last update</td>
<td>07/19/2022</td>
</tr>
<tr>
<td>Last Updated By</td>
<td>NPAY537</td>
</tr>
<tr>
<td>Date of last update</td>
<td>07/19/2022</td>
</tr>
<tr>
<td>WC Claim Type</td>
<td>Standard</td>
</tr>
<tr>
<td>Total Supplement Days</td>
<td>74.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Supplement Days</th>
<th>10.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay End Date</td>
<td>07/14/2021</td>
</tr>
<tr>
<td>Claim Number</td>
<td>072829963</td>
</tr>
<tr>
<td>SIF Award</td>
<td>$3476.35</td>
</tr>
<tr>
<td>Supplement Earn Code</td>
<td>WPS</td>
</tr>
<tr>
<td>Earnings Begin Date</td>
<td>06/04/2021</td>
</tr>
<tr>
<td>Earnings End Date</td>
<td>07/08/2021</td>
</tr>
<tr>
<td>Supplement Amount</td>
<td>0.00</td>
</tr>
<tr>
<td>Retirement Salary</td>
<td>3886.73</td>
</tr>
<tr>
<td>Service Days</td>
<td>25.00</td>
</tr>
<tr>
<td>OK to Pay</td>
<td></td>
</tr>
<tr>
<td>Date of last update</td>
<td>07/19/2021</td>
</tr>
<tr>
<td>Last Updated By</td>
<td>NPAY537</td>
</tr>
<tr>
<td>Date of last update</td>
<td>07/19/2021</td>
</tr>
<tr>
<td>WC Claim Type</td>
<td>Standard</td>
</tr>
<tr>
<td>Total Supplement Days</td>
<td>74.00</td>
</tr>
</tbody>
</table>
WC Claims
Supplement
Complex
Example
Retirement Reporting

• Employees on LOA/WPS must be reported to ERS via Form RS 2050 for:
  
  o Period between expiration of 195 days of supplemental eligibility and end of 1 year WC benefit
  
  o Any adjusted days during the supplement eligibility period
    • <51%
    • Abeyant
    • No Med

• All other periods will automatically report to ERS biweekly
Please Remember!

The following Additional Pay codes should be left on for employees while on Workers’ Compensation leave:

- IPF/IPP
- LOC/LMH
- GEO
- SDF
Changes to Incident and Injury Details Requirement
Changes to Incident and Injury Details Requirement

We have removed the requirement that corresponding Incident and Injury details exist in PayServ when entering a WC leave job transaction or request.

What does this mean for agencies?

• No more error messages when entering transactions
• No more WC Correct History requests denied due to missing Incident/Injury details

Incident and Injury Details pages will still be available for optional agency use.
Questions?

workerscomp@osc.ny.gov