

**SICK LEAVE INSURANCE
PROGRAM
(SLIP)**

DOCUMENT PROCESSING

Revised March 2018

**SICK LEAVE INSURANCE PROGRAM (SLIP)
DOCUMENT PROCESSING**

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**SICK LEAVE INSURANCE PROGRAM (SLIP)
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Insurance Document Processing

Upon notification from an employee that they intend to retire under the Sick Leave Insurance Program (SLIP), the employee needs to provide proper forms in order to process the employee's retirement correctly. These forms can be found on the DAS website at <https://das.iowa.gov/human-resources/employee-and-retiree-benefits/retirees/sick-leave-insurance-program-slip>

- o [Sick Leave Insurance Program Enrollment Form.](#)
- o [New application for health insurance](#), even if they are staying in the plan that they are currently enrolled in.
- o [Group Insurance Direct Pay Continuation Form.](#) *Note: Only health insurance state share premiums are eligible to be paid from the retiree's SLIP Balance.*
- o [Sick Leave Insurance Program Enrollment Checklist.](#)
- o [FAQ's](#)

IowaBenefits must be updated when a person is retiring. IowaBenefits will automatically send a P-1 Type 294 HEALTH/DENTAL BENEFIT CHANGE to zero out the current health/dental codes once the person's record is updated in IowaBenefits. The P-1 to zero out the health codes may need to be processed in a pay period or two earlier than the actual retirement. This would be the case if the employee share or state share of the insurance premium will be pulled for a month that the employee will be covered as a retiree under SLIP. See the following for a more detailed explanation of the timing when the health code should be zeroed out for an employee who is retiring under SLIP. An example of the P-1 type 294 to zero out the health code is included below.

D3325072 ACT: _	REPORT OF PERSONNEL ACTION (P-1)		----- P-1 TYPE -----
PRINTER:	RETIRED, LUCKY B.		294 HEALTH/DENTAL BENE
-- P-1 STATUS --	P-1 NUMBER: XXXXX		----- APPROVED BY -----
PROCESSED	EFFECTIVE DATE: 01/03/20XX		PA BENE PROC
OPTIONAL REMARKS*	INITIATED BY: XXX-XXXXXX		YES YES YES
215 214			
REMARKS:	SLIP RETIREMENT 1/4/XX (STOP H&D FOR 2/XX)		
----- F R O M ----- D E S C ----- T O ----- PAGE 1 OF 7			
	1I600 HI PLAN NUMBER 00000		
	/ / HI EFF DATE 02/01/20XX		
NOT DOUBLE SPOUSE	0 HI PLAN HOLDER* 0		NOT DOUBLE SPOUSE
	DI600 DI PLAN NUMBER* 00000		
	/ / DI EFF DATE 02/01/20XX		
NOT DOUBLE SPOUSE	0 DI PLAN HOLDER* 0		NOT DOUBLE SPOUSE
	- - SPOUSE SSAN - -		
NO DEPT IDENTIFIED	SPOUSE DEPT*		NO DEPT IDENTIFIED
----- * INDICATES SELECTION LIST			
? ACTION HELP	PF7 PREV	PF8 NEXT	PF9 HELP PF12 RETURN CLEAR EXIT

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The following guidelines and examples detail:

- The timing of zeroing the health codes
- Plans to choose from
- Medicare
- Whether a check needs to be written when an employee retiring under SLIP.

Timing:

The employee is only covered by the state's health insurance as an active employee through the end of the month of their term date. Starting the first day of the month after active employment ends, the employee (retiree) would move to being covered under the retiree group health insurance and premiums for the state share would be covered by their SLIP balance.

Example:

- An employee's last day worked is 01/27/20XX term date is 2/2/20XX
- The employee would be covered as an active employee on the state's health insurance through the month of February.
- They would then move as a retiree to SLIP coverage effective March 1st.

The HRA should zero out the health code in IowaBenefits (IB) in the pay period, according to the Deduction Schedule; they are no longer eligible for coverage as an active employee. DAS-SAE/Centralized Payroll will start withholding premiums for the month following the employee's retirement through the SLIP billing process.

Example:

- The employee notifies the HRA they are retiring on 02/27/20XX (02/14/20XX pay period).
- The HRA would need to zero out the health insurance code in IB the 01/31/20XX pay period.
- IB will automatically send a P-1 type 294 to HRIS to zero out the health insurance code. This will prevent both first half and second half employee share of the health insurance premiums (if applicable) from being deducted from the employee's pay check, as well as the state share of the health insurance premium from being charged to the department.

It is not necessary to re-enter the dental code for a SLIP retiree. The health insurance is put back into the retiree's record by DAS-HRE/Benefits via a P-1 type 293 RETIREE HEALTH/DENTAL BENEFIT CHANGE.

If the department does not terminate the employee early enough in IB, it can cause an insurance deduction to occur when the employee should no longer be covered as an active employee. If the deduction only occurs for the first half of the premium and not the second half, the employee will be refunded for the first half deduction.

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Example:

- The employee retires on 02/06/20XX; they would have had the first half of the March insurance premium taken out of their 02/21/20XX pay check.
- The HRA would prepare:
 - the Retirement 402 (executive branch) or 407 (non-executive branch) P-1
 - SLIP Calculation 470 (executive branch) or 475 (non-executive branch) P-1
 - zero out the health code on the Health/Dental Benefit Change on IB (which would generate the P-1 type 294) during the 02/14/20XX pay period.

The example above would prevent the second half of the health insurance premium from being taken out of the employee's pay check, as well as the state share of the health insurance premium being charged to the department. Because only the first half of the health insurance premium was taken and a termination has occurred, the system will auto generate the refund to the employee/retiree for the first half of the health insurance premium that the employee paid.

If the employee had the first half and the second half health insurance premium for the month following their retirement taken from their check as well as the state share of the health insurance premium being charged to their department, the department would have to manually initiate the health insurance premium refund to the employee and to the employee department.

Example: The employee retires 02/27/20XX

- They were not terminated in IowaBenefits prior to them retiring
- They would have had the first half of March health insurance premium taken out of their 02/21/20XX pay check
- The second half of March health insurance premium taken out of their 03/07/20XX pay check as well as the department being charged for the state share of the health insurance premium. Since the employee did not work in March, they are not eligible to be covered under the State's active employee health insurance coverage. The employee would be entitled to a full refund, as well as the department state shares.

Plans/Medicare:

When an employee retires under SLIP, they are able to decide:

- Which health insurance plan to be covered by upon retirement
- Continue with the health insurance plan that they had as an active employee
- Choose to change to any other health plan that the State offers with a lower total premium than their current plan.
- Eligible family members may be added to the retiree's health plan at the time of an event (as listed in the Benefits Booklet) or through the late enrollee process.
- The retiree has the option to switch to any health insurance plan that the State offers during the Annual Enrollment and Change Period each year.

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Example:

- An employee who had a health code of SE600 while an active employee will now have a health code of CE600 as a SLIP retiree.
- The only exception to this would be if the retiree has a spouse that is Medicare eligible and also enrolled in MedBlue RX. If the retiree's spouse is enrolled in MedBlue RX, the health code would have an R in the second position to accommodate the correct monthly premium for coordination with MedBlue RX.

HRA needs to make sure that the SLIP retiree is put into the correct health code. This includes

- Asking the SLIP retiree if they are on a family plan
- Asking if their spouse is eligible for Medicare. If the spouse is eligible for Medicare, a copy of the eligible person's Medicare card showing their Part A and/or Part B effective dates must be included with the health insurance application that is sent to HRE.
- Asking if their spouse is enrolled in MedBlue RX. If the spouse is enrolled in MedBlue RX, a copy of the eligible person's MedBlue RX card showing the effective date must also be included with the health insurance application that is sent to HRE.

This is important because it affects the premium paid to the health insurance company by both the State and by the retiree. There are special health codes for the Medicare Carve-Out plans and for the Medicare Carve-Out plans where the spouse is on Medicare and also is enrolled in MedBlue RX that are to be used when entering in the health code on HRIS. If you are uncertain what health code to use, please contact HRE-Benefits to clarify.

Note: the retiree's Medicare eligible spouse is allowed to enroll in MedBlue RX at the time of the retiree's leaving active employment, when the spouse first becomes eligible for Medicare, or during the annual Medicare Part D enrollment period which runs from November 15 through December 31 each year.

HRA's also need to remind the retiree that any changes made to their health insurance coverage must be communicated to DAS-SAE/Centralized Payroll and DAS-HRE/Benefits.

Example:

- The retiree is covered by a Wellmark plan
- They choose to purchase MedBlue RX on their own, the retiree should contact DAS-SAE/Centralized Payroll and DAS-HRE/Benefits.
- Enrolling in MedBlue RX lowers the monthly premium of the health insurance premium therefore allowing their SLIP balance to cover the premiums longer.
- Changes in the health code in HRIS to accommodate this will be made by DAS-SAE/Centralized Payroll or DAS-HRE/Benefits.

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Checks:

In some instances, a check will need to be collected from the retiring employee. This typically only happens after a month that has 3 pay dates, where the employee and state share is not taken out of the third pay check and the employee works at least one day of the new month. Or the employee will not have enough in their final pay check to pay the total employee share of the premium; they would have to give their HRA a check for the difference.

Example:

- An employee retires on 06/03/20XX
- The first half of their June employee share of the health insurance premium would have been taken from the pay check the employee received on 05/16/20XX.
- The pay check the employee received on 05/30/20XX would not have the second half deductions deducted from it since it is the third pay check for the month of May, and no health insurance deductions are taken from the third pay check.
- The second half of the employee share of the health insurance premium, as well as the state share would be taken out of the 06/13/20XX pay check.

In the above example, the employee would be eligible for health insurance coverage as an active employee in June since they worked in June. If the pay check they receive on 06/13/20XX is not large enough to cover the employee share of the health insurance premium, the employee would need to provide a check, payable to Treasurer – State of Iowa, to the HRA for the dollar amount of their share. The HRA will need to manually add this employee to their monthly health insurance billing as a billing adjustment.

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```

D3325186 ACT: _   REPORT OF PERSONNEL ACTION (P-1) | ----- P-1 TYPE -----
PRINTER:          NAME RETIRED, LUCKY B           | 470  SLIP CALCULATION
-- P-1 STATUS --  P-1 NUMBER .....: 1160256       | ----- APPROVED BY -----
    PROCESSED      EFFECTIVE DATE ....: 06/30/20XX  | PA  DEPT COMP PAYL PROC
OPTIONAL REMARKS* INITIATED BY .....: 005-410010   | YES YES YES YES YES
REMARKS:                                                |
----- F R O M ---- ---- D E S C ---- ---- T O ----- PAGE 1 OF 3
          1,767.20 | BIWEEKLY BASE |
                0.00 | SPEC DUTY PAY |
                0.00 | LEAD WORKER PAY|
                0.00 | EXTRA DUTY PAY |
                0.00 | EDUC DIFF PAY |
                0.00 | VOL FIREFIGHTER|
                0.00 | LONGEVITY PAY |
                0.00 | SPOC/DNR 4% PRM|
                0.00 | SPOC PREM PAY |
                | SHIFT DIFF BIWK|          52.00
                | MED PASSER BIWK|          6.00
$22.82 / HR      1,825.20 | TOTAL REG PAY |
----- * INDICATES SELECTION LIST

```

Page 1 of 3: The Biweekly Base and all recurring special pays shown above will be populated, **with the exception of Shift Differential and Med Passer**. If applicable, compute and enter the employee's regular biweekly amounts for these pay fields. The reason these cannot be populated automatically like the other pay fields that are on this screen is because they are not always a fixed amount; therefore, they are not stored on HRIS as a recurring pay amount. **If the employee receives Standby Pay this must also be entered on the calculation P-1, use either the Shift Diff or Med Passer files to calculate the 6 pay period average.** (Show your calculations on the remarks page)

```

D3325187 ACT: _   REPORT OF PERSONNEL ACTION (P-1) | ----- P-1 TYPE -----
PRINTER:          NAME RETIRED, LUCKY B           | 470  SLIP CALCULATION
-- P-1 STATUS --  P-1 NUMBER .....: 1160256       | ----- APPROVED BY -----
    PROCESSED      EFFECTIVE DATE ....: 06/30/20XX  | PA  DEPT COMP PAYL PROC
OPTIONAL REMARKS* INITIATED BY .....: 005-410010   | YES YES YES YES YES
REMARKS:                                                |
----- F R O M ---- ---- D E S C ---- ---- T O ----- PAGE 2 OF 3
          790.345504 | SICK BALANCE |          +
                | SICK ACCRUED PP|          0.28 -
                | SICK USED PP  |          0.00 = ACT.SK BAL: 790.625504
          98.487413 | VAC BALANCE |          +
                | VAC ACCRUED PP|          0.89 -
                | VAC USED PP  |          0.00 = ACT.VAC BAL: 99.377413
                |                |
                |                |
                |                |
----- * INDICATES SELECTION LIST

```

Page 2 of 3: The employee's sick and vacation balances as of the previous pay period will be displayed on the FROM and the TO side of the P-1. These balances are pulled from the D7 screen on the Employee Information (EI module). Calculate and enter the employee's sick and vacation accruals for the current pay period. Enter in any sick and vacation leave taken during the current pay period. *Note: When you press Enter, the new balances will be recalculated and shown on the TO side of the screen.* Show your calculation for those accrual amounts on the Remarks page. (See example below)

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D3325188 ACT: _	REPORT OF PERSONNEL ACTION (P-1)		----- P-1 TYPE -----
PRINTER:	NAME RETIRED, LUCKY B		470 SLIP CALCULATION
-- P-1 STATUS --	P-1 NUMBER: 1160256		----- APPROVED BY -----
PROCESSED	EFFECTIVE DATE: 06/30/20XX		PA DEPT COMP PAYL PROC
OPTIONAL REMARKS*	INITIATED BY: 005-410010		YES YES YES YES YES
REMARKS:			
----- F R O M ----- D E S C ----- T O ----- PAGE 3 OF 3			
22.82 / HR			
* 790.625504	SKLV BAL		

18,042.07	----->	SKLV PAYOUT PAY	2,000.00
- 2,000.00			

16,042.07			
* 80	PERCENT		

12,833.66		SLIP BEGIN BAL	12,833.66
22.82 / HR			
99.3797	VACATION BALANCE	TERM LEAVE PAY	2,267.85
----- * INDICATES SELECTION LIST			

Page 3 of 3: The newly calculated final sick and vacation balances from Page 2 will be displayed on the FROM side of this page. The applicable percentage rate for the final SLIP calculation is also shown, based on the employee's ending sick balance. It will be 100%, 80% or 60%.

The Sick Leave Payout of up to \$2,000 will be displayed on the TO side. The SLIP BEGIN BAL will also be shown on the TO side if there is any balance remaining after the Sick Leave Payout. And, finally, the TERM LEAVE PAY will be populated on the TO side. The SLIP beginning balance should be large enough to cover one month of insurance.

Example of remarks page

START DATE 01/16/1981 Retired 01/31/2014
BIWEEKLY \$1767.20 + SHIFT \$52.00 + MP \$6.00 = \$1,825.20/80 = HOURLY \$22.82 HOURLY PAID FOR 8 HOURS IN FINAL PAY PERIOD
* HOURS & BALANCES *
VACATION BALANCE ... 98.4874 VAC. ACCRUAL RATE .. 8.92307
SICK BALANCE 790.3455 SICK ACCRUAL RATE .. 2.76923
COMP BALANCE 3.96
COMP TIME BALANCE OF 3.96 WILL BE PAID OUT ON LAST CHECK VIA TIMESHEET.
VAC BAL: 98.4874 + EARNED: 0.8923 - used: 0.00
= FINAL BAL: 99.3797 * HOURLY: \$22.82 = \$2,267.85 VACATION PAYOUT
SICK BAL: 790.3455 + EARNED: 0.28 - used: 0.00
= FINAL BAL: 790.6255 * HOURLY: \$22.82 = \$18,042.07 sick payout (MAX \$2,000)
MED PASS AVERAGE \$6,\$6,\$6,\$6,\$6,\$6 = \$36.00/6 = \$6 MED PASS AVERAGE
SHIFT AVERAGE \$52,\$52,\$52,\$52,\$52,\$52= \$312/\$52 = \$52 SHIFT AVERAGE

Note: Comp Time, Holiday Comp Time, and Banked Holiday should be paid out using the corresponding time type on the HRIS timesheet if on time reporting or by using the appropriate fields on PAYN if not on time reporting.

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Approve the P-1 at the PA and DEPT levels. It will be reviewed and approved by DAS-HRE/Pre-Audit and DAS-SAE/Centralized Payroll. When this P-1 processes, the Sick Leave Payout and the Terminal Leave Pay amounts will be paid to the employee on their last payroll warrant. (Remember the termination date MUST be in the current pay period) By preparing the 470 or 475 SLIP CALCULATION P-1, you do not need to prepare a P-1 Type 846 CAT/OTHPAY/TERM/SK to pay the Sick Leave Payout and the Terminal Leave Pay.

Important! If you fail to pay out the Comp Time, Holiday Comp Time, or Banked Holiday on the HRIS timesheet or on PAYN, you will have to prepare P-1 type 846 CAT/OTHPAY/TERM/SK to pay out Comp Time, Holiday Comp Time, or Banked Holiday. **Please make sure the 846 P-1 processes before the 470 or 475 SLIP CALCULATION P-1.** If they process in reverse order, the Sick Leave Payout and Term Leave Payout will be zeroed out and the retiree will only be paid for the amount as calculated on the P-1 846 CAT/OTHPAY/TERM/SK. After both have processed, please check the Current Pay Screen (place a "C" in the header action field of the employee information screen and press enter) to verify that all amounts have properly processed and will be paid on the final warrant. See below for a screen print of the Current Pay Screen.

```

D3325370      ACTION:  _      EMPLOYEE INFO - CURRENT PAY      PRINTER:

+----- KEY INFORMATION -----+
| LAST NAME .....: RETIRED      |
| FIRST NAME .....: LUCKY        B |
| SOCIAL SECURITY: XXX-XX-XXXX    |
| EMPLOYEE NUMBER: XXXXX        |
+-----+-----+-----+-----+
| ANNUAL BONUS PAY .....:      0.00 | MOVE PAY .....:      0.00 |
| INCOME NOT SUB RET ...:      0.00 | SICK LEAVE PAYOFF PAY ...: 2,000.00 |
| REGULAR OTHER PAY ...:      90.37 | WORKER COMP DEDUCTION ...: 0.00 |
| TERM LEAVE PAY .....: 2,267.85 | FSA DEP CARE REF/ADJ .....: 0.00 |
| VACATION PAYOUT .....:      0.00 | FSA HEALTH REF/ADJ .....: 0.00 |
| CATASTROPHIC PAY .....:      0.00 | BACK PAY SUBJECT TO POR ..: 0.00 |
+-----+-----+-----+-----+

```

The Current Pay screen shows the Term Leave Pay and the Sick Leave Payout as calculated on the P-1 type 470 or 475 SLIP Calculation. It also shows the Regular Other Pay as calculated on the P-1 type 846 CAT/OTHPAY/TERM/SK, if used. This screen will not be populated with the dollar amounts until the P-1's have processed.

```

D3325361      ACTION:  _      EMPLOYEE INFORMATION      PRINTER:
EMPLOYEE RECORD RETRIEVED

+----- KEY INFORMATION -----+----- PAYROLL INFORMATION -----+
| LAST NAME .....: RETIRED      | PAY NAME ...:      |
| FIRST NAME .....: LUCKY        B | PAYGRADE .....: 24      STEP: MX |
| SOCIAL SECURITY: XXX-XX-XXXX    | PAY PLAN .....: 014    |
| EMPLOYEE NUMBER: XXXXX        | *MODE OF PAY ..: 03 BIWEEKLY HR WK: 40 |
|                               | ANNUAL BASE ..:      0.00 |
+-----+-----+-----+-----+
|                               | BIWEEKLY BASE : X,XXX.XX |
| NUMBER: XXX-XXX-XXXX-XXXXX-XXX |                               |
| CSTCNT: XXX XXXXXX            | FMR PAY PLAN ..: 002    |
| ASSIGN:                       |                               |
| CLASS TITLE:                  |                               |
| *TYPE .....: 00 PERM FULL TIME-MERT |                               |
| *EMP STATUS : 08 PERMANENT MERIT  |                               |
| *COND OF EMP: 01 FULL TIME      |                               |
| *ELIGIBILITY: N CONTRACT COVERED | SLIP PARTICIPANT |
| *BARG CODE ..: 002 TECHNICAL    |                               |
|                               | INCREASE DATE :      |
+-----+-----+-----+-----+
| FULLNAME:                     | *TERM. REASON ..: 90 RETIREMENT-SICK B |
| USER ID :                     | *LEAVE REASON ..: 00 ACTIVE |
+-----+-----+-----+-----+

```

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You will also see the Employee Information screen will have a designation on the right hand side of the screen that displays SLIP PARTICIPANT when the retirement P-1 has processed. This designation will help us track SLIP Retirees. (Note: Once the retiree is no longer eligible to participate in SLIP (turned 65, depleted SLIP balance, etc) DAS-SAE/Centralized Payroll will create a P-1 that will change the designation on the Employee Information screen from SLIP PARTICIPANT to FORMER SLIP PARTICIPANT.) The information on the current Employee Information screen will still show based on the position the retiree had while employed, but it will change once the retiree is transferred to their SLIP Position.

The SLIP BEGINNING BALANCE, as calculated on the P-1 Type 470 or 475 SLIP CALCULATION, will be transferred to the employee information SLIP participant detail screen (SLIP screen). This screen is part of the Employee Information module and may be accessed from the Employee Information screen by putting SLI in the header action field. You will see this when the P-1s for the Retirement (402 or 407) and the SLIP Calculation (470 or 475) have processed. See a screen print of the SLIP screen (SLI) is shown below.

```

D3325390 ACT: _ EMPLOYEE INFO - SLIP PARTICIPANT DETAIL PAGE: 0000
PRINTER:
+----- KEY INFORMATION -----+
| LAST NAME .....: RETIRED          | POSITION NUMBER: XXX-XXXX-XXXX-99054-XXX
| FIRST NAME .....: LUCKY           | BIRTHDAY .....: XX/XX/XXXX
| SOCIAL SECURITY: XXX-XX-XXXX      | RETIRE DATE ...: XX/XX/XXXX
| EMPLOYEE NUMBER: 07689           | DECEASED DATE ..: / /
+-----+ INELIGIBLE DATE: / /
INELIG. REASON:
HEALTH INS CODE: XXXXX             SPOUSE:
COVENTRY OPEN ACCESS              SPOUSE BIRTHDAY: / /
TOTAL PREMIUM: XXX.XX
STATE SHARE .. XXX.XX             STREET ADDRESS
HI EFF DATE ..                    CITY, STATE, ZIP
BEGIN BALANCE: $XX,XXX.XX          HOME PHONE

PROCESS      HEALTH  INS PLAN      HLTH ST SH      HLTH ST SH
DATE         CODE   HLTH ST SH     ACTUAL AMT      ACTUAL AMT      BALANCE
              / /           0.00           DEBIT           CREDIT
              / /           0.00           0.00           0.00
              / /           0.00           0.00           0.00

? HEADER ACTIONS
TRN SLIP TRANSACTION DETAIL      PF9 HELP      PF12 RETURN      CLEAR EXIT

```

Most of the fields on the SLIP screen are self-explanatory. You will note that there are four fields on this screen that are intended for data that is not stored in HRIS for an active employee. Those fields are INELIGIBLE DATE, INELIG REASON, SPOUSE, and SPOUSE BIRTHDAY. The P-1 type 471 SLIP CORRECTION allows DAS staff to make these entries and to make corrections or updates to the retiree's record when necessary. The fields near the bottom of the screen will be populated as the retiree's monthly payments are processed through a monthly billing cycle. While on the SLIP screen, if TRN is typed in the header action field, it will display another screen that shows the details of all SLIP transactions for that retiree. This screen will be a good resource for health insurance premium payments, as only two health insurance premium payments appear on the main SLIP screen.

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A screen print of the new TRN screen is shown below.

D3325391 ACT:		EMPLOYEE INFO - SLIP PARTICIPANT DETAIL				PAGE: 0001	
							PRINTER:
+----- KEY INFORMATION -----+							
	LAST NAME	RETIRED					
	FIRST NAME	LUCKY	B				
	SOCIAL SECURITY: xxx-xx-xxxx						
	EMPLOYEE NUMBER: xxxxx						
+-----+							
PROCESS	HEALTH	INS PLAN	HLTH ST SH	HLTH ST SH	BALANCE		
DATE	CODE	HLTH ST SH	ACTUAL AMT	ACTUAL AMT			
			DEBIT	CREDIT			
12/01/20XX	1N400		517.19	0.00	517.19	xx,xxx.xx	
11/01/20XX	1N400		517.19	0.00	517.19	xx,xxx.xx	
10/01/20XX	1N400		517.19	0.00	517.19	xx,xxx.xx	

Existing P-1s will be used when making changes to the retiree's information for items such as home address and phone number changes, name changes, etc. In the event you are contacted by one of your retirees with change information, please inform the retiree to notify Barb McNulty (515-281-3714) directly for the changes to be made to the retiree's SLIP record.

Because the retiree will be transferred the following pay period into a SLIP position in your department, you will be able to view their SLIP record and their historical data at all times. An exception would be if the retiree were to return to temporary state employment with another agency. Once the employing agency puts the retiree onto the system in the current temporary position, that retiree will no longer be able to be viewed by the retiring department. If the HRA has any questions regarding this situation, they can contact Barb McNulty directly at 515-281-3714.

**SICK LEAVE INSURANCE PROGRAM (SLIP)
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Transfer the SLIP Retiree into their SLIP Position

1. The next step, in the following pay period, is to transfer the retiree into one of the SLIP positions previously established. **A SLIP retiree cannot be moved into the SLIP position until the pay period following their retirement.**

Example:

- A person retires in the 02/14/20XX pay period
- Move them into the SLIP position the 02/28/20XX pay period.
- Warning - If a SLIP retiree is transferred to their SLIP position in the same pay period in which they retire, their last regular warrant (with their Term Leave Pay) will not write. There are edits in the system to prevent an employees in a class code of 99054 (SLIP) to be paid. This step is also important for the processing of the SLIP billings to the individual departments.

To initiate the P-1 Type 055 TRANSFER TO SLIP, start at the retiree's Employee Information (See page 6 for a screen print of the Employee Information screen) module screen and type in P-1 in the header action field. This will take you to the retiree's P-1's FOR AN EMPLOYEE screen as shown below.

```

D3325047 ACT: QW          PERSONNEL ACTIONS (P-1S)          PAGE: 0001
PRINTER:                P-1S FOR AN EMPLOYEE

SOCIAL SECURITY NUM  ==> XXX-XX-XXXX
EMPLOYEE NAME       ==> LUCKY B RETIRED
START AT PAY PERIOD ==> 12/29/20XX
QUICK WRITE P-1 TYPE ==> 055 TRANSFER TO SLIP

ACT PP BEGIN  -----STATUS-----  -----TYPE-----  NUMBER  COST
_  12/29/20XX  PROCESSED  HEALTH/DENTAL BENE  XXXXXXXX  XXX-XXXXXX
_  12/29/20XX  PROCESSED  SLIP CALCULATION  XXXXXXXX  XXX-XXXXXX
_  12/29/20XX  PROCESSED  RETIREMENT  XXXXXXXX  XXX-XXXXXX
  
```

P-1's FOR AN EMPLOYEE - Tab to the QUICK WRITE P-1 TYPE line and type in 055 and press enter. The screen will refresh and the Quick Write P-1 Type line will read 055 TRANSFER TO SLIP. Then type in QW in the header action field and press enter. This will start the process of writing the P-1 Type 055.

```

D3325041          PERSONNEL ACTIONS (P-1S)          PAGE: 0001
                  POSITION SELECTION LIST

COST CENTER      ==> XXX-XXXXXX
POSITION NUMBER   ==> XXX-XXX-XXXX-XXXXX-XXX
* * TYPE AN 'S' NEXT TO THE POSITION TO BE FILLED * *
CT ---POSITION NUMBER----  ---EMPLOYEE NAME-----  ---CLASS-----  -POSITION TYPE--
_  XXX-XXX-XXXX-XXXXX-XXX  * * * VACANT * * *      SECRETARY 2     PERM FULL TIME-M
_  XXX-XXX-XXXX-XXXXX-XXX  * * * VACANT * * *      TYPIST-ADV     PERM FULL TIME-M
_  XXX-XXX-XXXX-99054-001  * * * VACANT * * *      SLIP RETIREE SLIP

S SELECT POSITION      PF7 BKWD  PF8 FWD  PF9 HELP  PF12 RETURN  CLEAR EXIT
  
```

The next screen that will appear is the Position Selection List. Type in the cost center that your SLIP positions were created and press enter. Scroll through the list of positions, if necessary, and place an "S" in the line of the SLIP position that you want to move the retiree into and press enter. This then takes you into the five pages P-1 Type 055 TRANSFER TO SLIP.

**SICK LEAVE INSURANCE PROGRAM (SLIP)
DOCUMENT PROCESSING**

```

D3325061 ACT: _   REPORT OF PERSONNEL ACTION (P-1) | ----- P-1 TYPE -----
PRINTER:          RETIRED, LUCKY B                | 055 TRANSFER TO SLIP
-- P-1 STATUS --  P-1 NUMBER .....: 1160257      | ----- APPROVED BY -----
NEEDS PROCESSING EFFECTIVE DATE ....: 07/14/20XX  | PA  DEPT PAYL PROC
OPTIONAL REMARKS* INITIATED BY .....: 005-410010  | YES YES YES NO
REMARKS:                                               |
----- F R O M ----- D E S C ----- T O ----- PAGE 1 OF 5
                RETIRED|   LAST NAME   | RETIRED
                LUCKY|   FIRST NAME  | LUCKY
                   B |   MIDDLE NAME | B
                   |               |
                   F |   SEX         |
WHITE (NON-HISPANIC ORIGI 0 | ETHNIC ORIGIN* |
                XXX-XX-XXXX | SOCIAL SECURITY |   -
                XX/XX/xxxx |   BIRTH DATE   |   /
NO DISABILITY          0 | DISABILITY CD* |
                   |               |
----- * INDICATES SELECTION LIST

```

Page 1 of 5: Make any necessary changes on this screen. It is unlikely there would be any.

```

D3325062 ACT: _   REPORT OF PERSONNEL ACTION (P-1) | ----- P-1 TYPE -----
PRINTER:          RETIRED, LUCKY B                | 055 TRANSFER TO SLIP
-- P-1 STATUS --  P-1 NUMBER .....: 1160257      | ----- APPROVED BY -----
NEEDS PROCESSING EFFECTIVE DATE ....: 07/14/20XX  | PA  DEPT PAYL PROC
OPTIONAL REMARKS* INITIATED BY .....: 005-410010  | YES YES YES NO
REMARKS:                                               |
----- F R O M ----- D E S C ----- T O ----- PAGE 2 OF 5
                XXXXXXXXXXXXXXXX | STREET ADDR 1 | XXXXXXXXXXXXXXXX
                   |               |
                   XXXXXX |   CITY         |
                   XX   |   STATE        |
                XXXXX-XXXX |   ZIP CODE     |   -
POLK                XX   | CO. RESIDENCE* |
                XXX-XXX-XXXX |   HOME PHONE   |   -
                   |               |
----- * INDICATES SELECTION LIST

```

Page 2 of 5: Make any necessary changes on this screen. It is unlikely there would be any. Verify the address uses the USPS guidelines for abbreviations and that no punctuation is used.

SICK LEAVE INSURANCE PROGRAM (SLIP) DOCUMENT PROCESSING

D3325065 ACT: _	REPORT OF PERSONNEL ACTION (P-1)		----- P-1 TYPE -----
PRINTER:	RETIRE, LUCKY B		055 TRANSFER TO SLIP
-- P-1 STATUS --	P-1 NUMBER: 1160257		----- APPROVED BY -----
NEEDS PROCESSING	EFFECTIVE DATE: 07/14/20XX		PA DEPT PAYL PROC
OPTIONAL REMARKS*	INITIATED BY: 005-410010		YES YES YES NO
REMARKS:			
----- F R O M ----- D E S C ----- T O ----- PAGE 3 OF 5			
DAS/SAE ACCOUNTING	005-410010	COST CENTER	402-960099 DES MOINES SERV AR
POLK	77	COUNTY OF EMP.*	
005-C85-4100	-90712-001	POSITION NUMBER	402-M10-6600-99054-001
	35	PAY GRADE	10
	EX OFF 3	CLASS TITLE	SLIP RETIREE
40.65 / HR	3,252.00	BASE SALARY	0.00 0.00
	MX	BASE STEP	BB
----- * INDICATES SELECTION LIST			

Page 3 of 5: Enter BB for the BASE STEP. This step is used is because the default class code of 99054 (SLIP RETIREE) and there is no base pay applicable to a SLIP retiree. The Cost Center, Position Number, Pay Grade, Class Title, and Base Salary will automatically be populated based on the position number that was selected previously in the process of writing the P-1 type 055 TRANSFER TO SLIP.

D3325067 ACT: _	REPORT OF PERSONNEL ACTION (P-1)		----- P-1 TYPE -----
PRINTER:	RETIRE, LUCKY B		055 TRANSFER TO SLIP
-- P-1 STATUS --	P-1 NUMBER: 1160257		----- APPROVED BY -----
NEEDS PROCESSING	EFFECTIVE DATE: 07/14/20XX		PA DEPT PAYL PROC
OPTIONAL REMARKS*	INITIATED BY: 005-410010		YES YES YES NO
REMARKS:			
----- F R O M ----- D E S C ----- T O ----- PAGE 4 OF 5			
RETIREMENT-SICK BAL	90	TERM. REASON*	
	06/30/20XX	TERM. DATE	/ /
	06/30/20XX	LAST WORK DAY	/ /

Page 4 of 5: There is nothing to enter on this screen as the 3 fields will be populated as a result of the Termination P-1 processed the previous pay period.

**SICK LEAVE INSURANCE PROGRAM (SLIP)
DOCUMENT PROCESSING**

```

D3325068 ACT: _   REPORT OF PERSONNEL ACTION (P-1) | ----- P-1 TYPE -----
PRINTER:          RETIRED, LUCKY B                | 055 TRANSFER TO SLIP
-- P-1 STATUS --  P-1 NUMBER .....: 1160257      | ----- APPROVED BY -----
NEEDS PROCESSING EFFECTIVE DATE ....: 07/14/20XX | PA  DEPT PAYL PROC
OPTIONAL REMARKS* INITIATED BY .....: 005-410010 | YES YES YES NO
REMARKS:
----- F R O M ----- ----- D E S C ----- ----- T O ----- PAGE 5 OF 5
    PERM FULL TIME-MERT      00 | POSITION TYPE* | 55 SLIP
    PERMANENT MERIT          08 | EMPLOYEE STAT* | 55 SLIP
    FULL TIME                 01 | COND OF EMP*  | 55 SLIP
----- * INDICATES SELECTION LIST

```

Page 5 of 5: The POSITION TYPE will be defaulted to 55 SLIP. Enter 55 for the EMPLOYEE STATUS and the CONDITION OF EMPLOYMENT. You may use the selection lists for these two fields. When this P-1 processes, the retiree's 18-digit position number will be changed to the new SLIP position number on their HRIS record.

- Putting Health code back in retiree's record:** In the pay period after the employee retires, DAS-HRE/Benefits will prepare a P-1 type 293 RETIREE HEALTH/DENTAL BENEFIT CHANGE to put the health code that the employee chose at the time of retirement. DAS-HRE/Benefits will also put all approval levels on the P-1. Page 1 of the P-1 293 is shown below.

```

D3325072 ACT: _   REPORT OF PERSONNEL ACTION (P-1) | ----- P-1 TYPE -----
PRINTER:          RETIRED, LUCKY B .              | 293 RETIREE HEALTH/DEN
-- P-1 STATUS --  P-1 NUMBER .....: 2087417      | ----- APPROVED BY -----
PROCESSED         EFFECTIVE DATE ....: 02/28/20XX | PA  BENE PROC
OPTIONAL REMARKS* INITIATED BY .....: 005-350000 | YES YES YES
215
REMARKS: SLIP
----- F R O M ----- ----- D E S C ----- ----- T O ----- PAGE 1 OF 7
          00000 |HI PLAN NUMBER | CE400
          03/01/20XX | HI EFF DATE | 03/01/20XX
NOT DOUBLE SPOUSE      0 |HI PLAN HOLDER*|
          00000 |DI PLAN NUMBER*|
          03/01/20XX | DI EFF DATE | / /
NOT DOUBLE SPOUSE      0 |DI PLAN HOLDER*|
          - - | SPOUSE SSAN | - -
NO DEPT IDENTIFIED    | SPOUSE DEPT* | NO DEPT IDENTIFIED

```

SICK LEAVE INSURANCE PROGRAM (SLIP) DOCUMENT PROCESSING

Monthly Billing Process

DAS-SAE/Centralized Payroll has a SLIP Master File which contains all individuals who have retired under SLIP. DAS-SAE/Centralized Payroll tracks:

- The retiree's SLIP beginning balance
- SLIP position number
- The health insurance code before retirement
- Health insurance code for plan chosen at retirement
- The effective date of the new health code.

Once the monthly billing file is processed, DAS-SAE/Centralized Payroll receives a Monthly Billing Report for SLIP Retirees (075N371-A). The information contained in the SLIP journal is similar to the regular payroll journal, with the only charges being for the state share of the health insurance premium. The SLIP journal is organized by 10 digit payroll number, and then totaled by 6 digit payroll number and a grand total for each department.

The retiree's date of birth and remaining SLIP balance are shown on the SLIP journal. This same information can be obtained by looking on HRIS, Employee Information, and looking at the individual retiree's SLIP Screen (SLI). If the retiree has become ineligible or will become ineligible in the near futures, you will see a COMMENT listing the reason that they are ineligible.

DAS-SAE/Centralized Payroll tracks the SLIP retirees' balances and communicates directly with the retiree when they are within 60 to 90 days of depleting their SLIP balance. DAS-SAE/Centralized Payroll also collects the necessary money from the retiree to pay the entire state share health insurance premium in the month the retiree depletes their SLIP funds. DAS-SAE/Centralized Payroll will prepare a P-1 type 471 SLIP Correction in the month that they become ineligible for SLIP and will also prepare a P-1 type 491 to terminate the retiree and change the term code from 90 (Retirement Sick Bal Conv to Health) to 91 (Sick Bal \$ Depleted).

Example:

- A retiree has a health insurance plan with a state share of \$580.71 and a SLIP balance of \$300.
- DAS-SAE/Payroll would collect the difference of \$280.71 from the retiree, the \$300 balance from the department, and make the entire final month's premium payment of \$580.71 to the health insurance company.
- The following month, the retiree would switch to the direct pay and receive a bill directly from the insurance company.
- The state would no longer pay a portion of the health insurance premiums; therefore, the retiree's department would no longer be billed for these premiums.

DAS-SAE/Centralized Payroll is also monitoring the retiree's age to determine Medicare eligibility, and removes the retiree from the monthly billing and prepares P-1 type 471 SLIP CORRECTION in the month that they become Medicare eligible. DAS-HRE/Benefits is also monitors the retiree's age and communicates directly with the retirees several weeks prior to becoming ineligible for the SLIP program due to becoming Medicare eligible.

**SICK LEAVE INSURANCE PROGRAM (SLIP)
DOCUMENT PROCESSING**

1075N371-A	MONTHLY BILLING REPORT FOR SLIP RETIREES						
RUN DATE: 02/07/20XX	EFFECTIVE 01/01/20XX						
RUN TIME: 11.49.22							
XXX-XXX-XXXX	FINANCE & ADMINISTRATION						
ORETIREE NAME	CLASS-POS	EMPLOYEE NUMBER	HEALTH CODE	BIRTH DATE	HLTH STSHR FROM CARRIER	HLTH STSHR FROM RATE TABLE	REMAINING BALANCE
LUCKY B. RETIRED	99054-002	xxxxxx	CX400	02/19/1951	1,122.75	479.81	18,893.71

Fields on the SLIP Journal are as shown in the snapshot above. Most fields are self-explanatory, but a couple fields necessitate a more detailed explanation.

- The HLTH STSHR FROM CARRIER is the amount of the State Share owed to the health insurance company for that retiree and is what will be charged to your department for the month.
- The HLTH STSHR FROM RATE TABLE is the amount that is pulled from the rate table on HRIS.

As you can see in the example above the two amounts do not match. In this example, the person is moving from family coverage to single coverage effective 2/1/20XX. The rates do not match due to the fact that the SLIP Journal shown is for January coverage, and their new health insurance code effective for February had already been loaded into the HRIS system at the time the journal was run. The amount shown in the HLTH STSHR FROM RATE TABLE is the premium amount that will go into effect on February 1.

The only time the amounts in the two columns should be different is:

- If the retiree changes their coverage and the health code is changed on HRIS before the current month billing is run
- If the retiree will deplete their SLIP account during the current billing cycle.

These scenarios above would cause the two amounts to be different; however, the department will be billed the correct amount for the health coverage that was in effect for each month.

When the retiree makes changes to their insurance by notifying Wellmark only and not DAS-HRE/Benefits or DAS- SAE/Centralized Payroll, this may cause DAS-SAE/Centralized Payroll to over/under bill the department in error. When this happens, we will notify the department and outline the steps that will be taken to correct the error.

SLIP Journal messages that may show up on the COMMENT line are in the table below.

Event	SLIP Journal Message
Returned to full-time employment with the State	Return to Perm Employ
Deceased	Deceased
Terminated Insurance coverage	Insurance Terminated
SLIP Balance is exhausted	Depleted SLIP Account
Retiree reaches age 65	Turned age 65
Retiree is no longer eligible for benefits (DAS-SAE/Payroll prepares P-1 to set ineligible reason)	Inactive Date Set

Once DAS-SAE/Centralized Payroll has reconciled the Monthly Billing Report for SLIP Retirees, DAS-ITE runs the billing file and produces the SLIP Health State Share Billing (075N372-A). This report is received by DAS-SAE/Centralized Payroll and reconciled against the Monthly Billing Report for SLIP Retirees (SLIP Journal).

**SICK LEAVE INSURANCE PROGRAM (SLIP)
DOCUMENT PROCESSING**

1075N372-A	SLIP HEALTH STATE SHARE BILLING										RUN DATE: 02/07/20XX
											RUN TIME: 15.28.37
											PAGE NO. 1
0 DEPT XXX-XXX-XXXX	FINANCE/FINANCIAL REPORTING AND BUDGET										
	SUB										
	FY	FUND	AGCY	ORGN	ORG	ACTIV	FUNCTION	JOB NO	AGCY REP	BILLING AMT	
									CAT		
	0001	XXX	2240							1,602.54	

Fields included on the SLIP Health State Share Billing are as shown above in the snapshot. When you receive your actual report, all applicable fields will be populated and a billing amount will be populated. The SLIP Health State Share Billing is organized by 10 digit payroll number, and totaled by fund to be charged for each department.

Two copies of the Monthly Billing Report for SLIP Retirees (SLIP Journal) and one copy of the SLIP Health State Share Billing are sent to each department. A cover letter will accompany these reports and will detail the date the funds will be charged to the department via an IET (Internal Exchange Transfer). These IET transactions will process as I/3 accounting documents with the document numbers automatically assigned to them as follows: xxxPSxxxxxxx. (PS stands for Payroll SLIP). After reviewing the SLIP Health State Share Billing, if there are any corrections to be made, the department should contact DAS-SAE/Centralized Payroll. Once DAS-SAE/Centralized Payroll has collected the health insurance premiums, the payments are made to the health insurance companies.

SICK LEAVE INSURANCE PROGRAM (SLIP) DOCUMENT PROCESSING

Corrections for a SLIP Retiree

There may be instances where the HRA will have to make corrections for a SLIP retiree. Depending on what step the HRA is at in the SLIP retirement process for the individual retiring, there will be certain steps that the HRA must follow to make corrections. In some instances, the HRA might have already transferred the retiree into their SLIP position before it is discovered that a correction is needed. The most common reasons we have encountered to date for bringing a SLIP retiree back onto payroll are:

- The retiree's Deferred Compensation deduction was not calculated correctly and it caused the Deferred Compensation deduction to fail.
- They were not paid for hours that they are entitled to (i.e., hours work in the last pay period of employment or comp time balance payoff).

Whenever a correction is needed to be made to a SLIP retiree's record, it will be necessary to call DAS-SAE/Centralized Payroll (and DAS-HRE/Deferred Compensation in the event of a deferred compensation error) for help with these corrections. Corrections performed will be dependent upon where during the SLIP process the error is discovered.

Returning a SLIP Retiree as active employee

If you need to bring a retiree back into an active position for back pay or for a settlement and it is a one-time payment, you will need to contact DAS-SAE/Centralized Payroll for the steps that need to be completed to bring them back to an active position.

If the SLIP retiree comes back to employment as a temporary employee, depending on if they are still an active SLIP retiree or not, the following form [SLIP Retiree Rehire Authorization](#) will need to be completed and the following steps will need to be taken:

Example: FORMER SLIP retiree comes back to work as a temp employee and then terminates

- The HRA would key a P1 #065 to put them in a temporary seat
- When the SLIP retiree terminates, key a P1 #403 Termination of Temp employee with a term code of 73 using the current term date.
- The HRA would not need to correct the term code or put the retiree back into their SLIP position.
- We want the retiree's record to reflect their most current position that was held.

Example: ACTIVE SLIP retiree comes back to work as a temp employee and then terminates

- The HRA would key a P1 #065 to put them in a temporary seat
- When the SLIP retiree terminates, key a P1 #403 Termination of Temp employee with a term code of 73 using the current term date.
- Once the P1 #403 processes, the HRA would need to correct the term code with P1 #490 and enter the original retirement date
- Then the HRA will need to transfer the retiree back into their SLIP position. With a P1 #055