

**NYSIF DIVISION 240
L/M MEETING AGENDA
199 Church Street, New York City
JULY 20, 2017**

PEF	MANAGEMENT
Melanie Rush - Co-Chair	Cliff Meister - Co-Chair
Dan Warren	Alyce Siegel
David Dubofsky	Armin Holdorf
Karen Walter	Heather Woolfolk
Katherine Czachorowski	
Patty Mason	
Prashant Singapura	
Radhakrishna Mohan	
Shentah Pizarro	
Clifvon Jones	
Milena McNally - PEF Field Rep	Patti Albert - via conference

- 1) **Minutes:** Previous April 20, 2017 minutes have been approved.
- 2) **Next Meeting:** PEF proposes the next meeting to be held on October 12, 2017 at 10:00am.
- 3) **Local L/M Meetings:** PEF representatives individually reported the status of the local LM meetings for their respective district offices (specifics intentionally omitted from the minutes).

Added on Item - ITS Loss of Flextime:

PEF respectfully requests clarification on the above cited policy, specifically PEF inquires as to whether flextime will be permanently suspended for ITS. If this is the case PEF reserves the right to bargain over a) the unilateral change to policy to loss of flex time and b) the impact of this change. Further PEF requests that, c) management investigate the clarification of this policy as promulgated by Gary Niles in NYC in an email dated Monday July 17, 2017 at 12:53 pm.

Specifically, PEF requests management address points a), b), and c) in an email as referenced in Mr. Niles email of 7/17/17, to determine congruency with NYSIF employee hand book, the PEF NYS agreement, and the civil service leave and attendance manual.

Management responds: Management agrees to investigate the issues PEF raises and commits to a follow up meeting/ conference with Milena McNally to be held on August 22, 2017. Management further agrees to share with Ms. McNally the information gathered on this issue and to discuss what action will be taken to clarify the details of this email. Management and PEF both express a desire to work together to resolve these concerns.

4) Statewide Staffing Levels:

a) Hearing Representatives: PEF asks that management please advise as to the status of hiring new Hearing Representatives for the NYC office, and statewide. How many openings are there for this item on a statewide basis? Which offices, if any, is SIF prioritizing for obtaining new Hearing Representatives?

Management responds- SIF has hired 2 new Hearing Representatives in the NYC Hearing Division and, statewide, there is 1 new Hearing Representative hired in the Binghamton office. There are no additional requests for Hearing Representatives being considered at this time.

PEF's position is that there is an overall need statewide for Hearing Reps.

Management responds - Discussions regarding Hearing Representative staffing at local offices should take place between each office's Business Manager and local PEF reps on a regular basis.

b) Insurance Fund Services Specialist (IFSS) 4 - PEF asks Management to please advise as to the job description/duties for the IFSS 4. When is the test for this item scheduled? Is this item replacing a current title, and, if so, which title? Will the IFSS 4 be a member of the PEF bargaining unit or designated M/C? Is SIF working on Tasks and Standards and a Performance Program for this title? Does a Civil Service Class Description exist for this title?

Management responds - This series has replaced the credit and collection series. The IFS4 title has replaced the Assistant Credit and Collections Manager title. Civil Service has not scheduled an exam for this title. Management shared with PEF IFSS classification standard which illustrates job duties for each of the 4 titles. (1 thru 4 in the series which are all allocated to PEF)

5) Update on RFP's - Triad contract:

PEF Inquires: Has Triad reduced lost time or demonstrated that they are able to get claimants back to work sooner than SIF CSRI's? How has SIF obtained this information? Is this a factor that SIF is considering in retaining Triad for this work, in lieu of using PEF-represented employees?

How much has SIF paid to Triad to date on all projects in the last calendar year? Is it SIF's position that using Triad for this work has saved SIF money? If so, PEF requests an explanation of this assertion, including data showing Triad's savings to SIF. On what basis, and for what purpose, is the Triad contract being extended?

Management responds:

Claims which are part of the TPA Triad pilot program are administered by NYSIF's Case Managers (CSR1s) who are responsible for all administrative functions of those claims. Triad's role is similar to that of a safety group's.

Triad's function is not to replace PEF represented positions with TPA positions.

GOER, the agencies, and the executive chamber of NYS will determine the success of the triad pilot. It is management's position that our statewide PEF L&M meeting is not the forum to disseminate reports regarding savings, costs or to discuss the effectiveness of this vendor.

PEF responds that it has a vested interest in the Triad pilot program. Is uniquely related to the retention of PEF workers at the SIF.

6) Underwriting Manual: PEF requests an update on the progress of revisions to the Underwriting Manual. Does this project have an expected date of completion?

Management responds: The Underwriting Department just posted a new version of its manual on the intranet that makes it searchable across the entire document. Previous versions only allowed search for one section at a time. There are 52 chapters - not all chapters require modification. The committee has performed a review of 33 chapters, with a handful of added chapters requiring minor changes. Underwriting will continue updating the manual to reflect a portion of the revised changes rather than in mass so we can highlight the sections changed.

PEF inquires as to the hiring of additional Underwriters.

Management responds - management does not anticipate a need for additional Underwriters as a result of these system changes.

7) Email MOU: PEF requests an update on the status of draft agreement, and requests management and PEF schedule a meeting today to meet, confer, and agree on remaining language so we may move forward.

Management responds: Management thanks PEF for the sample MOU'S provided. After review and consult with GOER, Administration has decided that they are not interested in engaging in a formal MOU with PEF at this time in lieu of removing PEF's physical bulletin board. Management reminds all that union representatives may not use SIF email system to conduct union business outside of communication directly pertaining to Labor Management and H&S Committee matters.

PEF respectfully requests that management reconsider its position. PEF's position is that such an MOU provides a mutual benefit to employer and labor alike by clearly delineating for all parties. PEF understands management's expectations regarding the use of state email; however, it is important to codify these expectations for all union representatives at SIF.

In addition, PEF respectfully requests management reconsider its denial of posting L&M and H&S minutes on the SIF intranet. The purpose of such posting is to disseminate information on both sides and creates better work place communication.

8) Classification Standards for CSR 3 Exam: PEF has learned that Hearing Reps were not allowed to take the CSR3 test at this time, despite significant interest and past qualification for the exam. Why has the Hearing Rep title been excluded from the current CSR 3 exam? PEF requests management reconsider the suitability of Hearing Reps for this exam in the future?

Management responds: Civil Service along with NYSIF management determined qualifications appropriate for the CSR 3 title. As a second level supervisory title, great importance was placed on the supervisory component of the position when arriving at the minimal qualifications. Management further indicated that the qualifications for this title have been finalized for the exam schedule for 8/12/17; however, these qualifications can be revisited with each exam.

PEF Responds: PEF believes the Hearing Rep title is qualified for the CSR 3 position, and it has been a qualifying title for previous exams. PEF respectfully requests SIF evaluate these standards on an exam by exam basis to include Hearing Reps in the promotional track for CSR3 in the future.

9) PEF requests management complete its review of additional wording for voicemail policy, and inform employees that this information should be added to outgoing messages.

Management responds: Management forwarded PEF's recommendation to the Customer Service Dept. for review and consideration.

PEF responds: PEF respectfully requests a dispositive answer for the next meeting.

10) PEF office at 199: Does SIF intend to extend office space to PEF at 199 Church Street once the construction is complete? If so, when? If not, what accommodations will SIF make for PEF for union meetings and meetings with individual members? What will be the process to request use of these spaces?

Management responds: Management was advised that PEF had already discussed this issue with Administration and will follow up on PEF's questions re: PEF's accommodations.

PEF respectfully responds that it appreciates the use of an office at 199 Church street for the last 30 years, and requests that a similar accommodation be made for PEF's use at the end of the construction. It is PEF's position that an office on SIF's premises over a 30-year period has created a long standing past practice. For this reason, we ask that this request be granted.

11) Bedbugs at 199 and 1301: PEF requests that management create and disseminate a standard and uniform policy across all departments when any employee is bitten by, and/or observes bedbugs in the office.

Management responds: NYSIF does have processes in place to identify and remediate bed bugs and those processes have been discussed during the SWH&S meeting. Management will consider whether a formal policy on bed bugs is necessary or can be part of another policy. In the meantime, any employee who suspects bed bugs in an area, or believes they have been bitten by a bedbug in the work place, should immediately report this to the local Business Manager who will then pursue the issue.

12) Extended medical leave: PEF requests clarification on the policy requiring that employees may only return to work with no restrictions. It is PEF's position that this policy may cause some employees to be out of work longer than necessary, causing a hardship to them and to their co-workers. If the restriction is not reasonably related to their job requirements, then the employee should be allowed to return to work.

Management responds: Management is in agreement with PEF's position and will be removing "no restrictions" language from its policies. Management states that medical documentation maybe sent electronically transmitted from the medical providers office via fax or email or regular paper transmission.

PEF inquires as to whether SIF would agree to remove language requesting prognosis from employee medical documentation, and modify the diagnosis requirement to be a "brief diagnosis" in line with article 33 of the PEF agreement. Presently the policies as written in the NYSIF employee handbook prior to April 2017 were agreed to by management, PEF and CSEA.

PEF respectfully requests that SIF remedy this oversight.

Management responds: Management will follow up by next SWLM meeting.


Melanie Rush, Co-Chair PEF


Cliff Meister, Co-Chair Management