



ANDREW M. CUOMO  
GOVERNOR

STATE OF NEW YORK  
DEPARTMENT OF CIVIL SERVICE  
ALBANY, NEW YORK 12239  
www.cs.ny.gov

JERRY BOONE  
COMMISSIONER

**NY12-37**  
**PE12-27**  
**SEHP12-08**

**TO:** New York State and Participating Employer Health Benefits Administrators

**FROM:** Employee Benefits Division

**SUBJECT:** New York State Benefits Eligibility and Accounting System Transaction related to Imputed Income

**DATE:** November 5, 2012

The New York State Benefits Eligibility and Accounting System (NYBEAS) has been updated to integrate PaySERV payroll codes to properly track and report biweekly imputed income amounts for enrollees covering same-sex spouses.

For additional information regarding these payroll codes, please refer to Payroll Bulletin No. 1100 issued by the Office of the New York State Comptroller. For additional background information, please refer to HBA Memo NY11-21, PE11-20, SEHP11-07.

Please refer to the following information for processing instructions relative to enrollments of same-sex spouses.

**How to remove imputed income for NYS tax purposes ONLY for enrollees covering their same-sex spouse on NYSHIP**

1. Go to *Benefits -> Transactions -> Personal / Employment*
2. Enter the enrollee's EmplID

**Personal/Employment**

Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

EmplID:	begins with	555005566
Empl Rcd Nbr:	=	
Last Name:	begins with	
First Name:	begins with	
Department:	begins with	
Retirement Number:	begins with	

Correct History    Case Sensitive

     [Basic Search](#)    [Save Search Criteria](#)

3. Select the tab titled *Personal Details*

**Name / Id   Address/Phone   Personal Details**

<b>Employment Information</b>	
<b>Holmes, Sherlock</b>	EmplID: 555005566
<b>Personal Data</b>	<b>Employment Information</b>
Date of Birth: 10/30/1980	Hire Date: 01/01/2012   Rehire Date: 01/01/2012
Date of Death:	Termination Date:   Service Date: 01/01/2012
Original Start Date: 01/01/2012	Last Date Worked:   California <input type="checkbox"/> Disabled
<b>Retirement Information</b>	
Retirement Reg.#:	Medicare Id: 555005566A
Retirement System:	Retirement Number:
Retirement Type:	Retirement Tier:
<b>Personal History</b> Find   View All   First 1 of 1 Last	
*Effective Date: 01/01/2012	*Marital Status: Single
*Gender: Male	Marital Status Date:

4. Verify the Marital Status is *Married*. **The transaction will not save if both the enrollee and spouse's marital status are not set to *Married*.**

5. If the enrollee's marital status is not set to married, you have to hit the , and enter a new row of information. Keep in mind the Effective Date on the Personal History row defaults to today's date; please update with the appropriate date. Be sure to verify Gender is correct, change the Marital Status to *Married* and the Marital Status Date to the date on the marriage certificate.
  - a. **Example:** If you are updating information for a new employee and they have been married prior to being hired with your agency, the effective date should be before or equal to the date benefits would go into effect.
  - b. **Example:** If you are updating information for an employee who has newly married, the effective date should equal the marital status date.

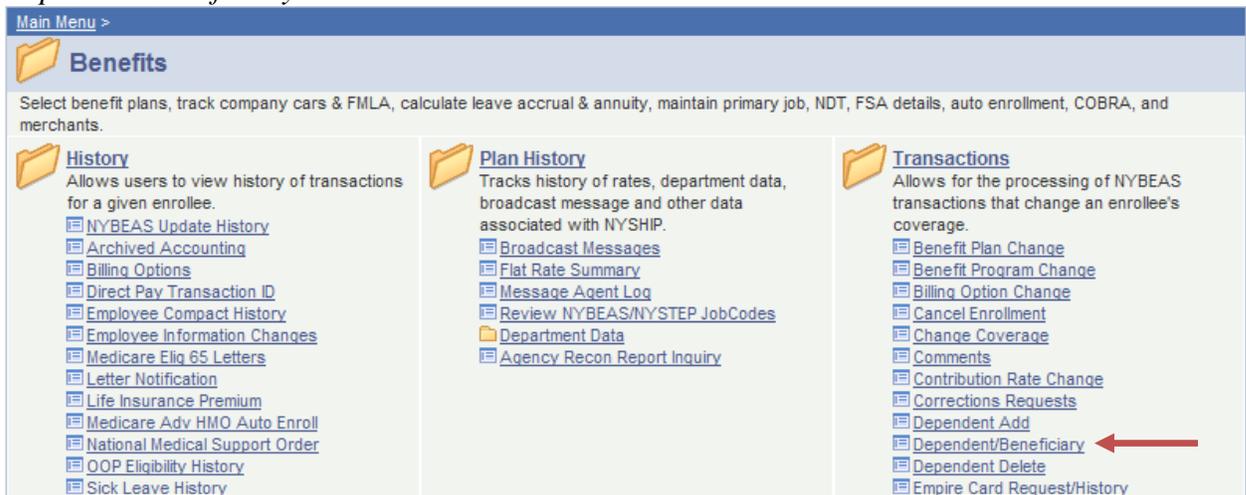


**Personal History** Find | View All First 1 of 1 Last

\*Effective Date: 01/01/2012  \*Marital Status: Married   

\*Gender: Male  Marital Status Date: 01/15/2012 

6. Verify the Marital Status of the dependent. Go to *Benefits -> Transactions -> Dependent/Beneficiary*.



Main Menu >

**Benefits**  
Select benefit plans, track company cars & FMLA, calculate leave accrual & annuity, maintain primary job, NDT, FSA details, auto enrollment, COBRA, and merchants.

- History**  
Allows users to view history of transactions for a given enrollee.
  - [NYBEAS Update History](#)
  - [Archived Accounting](#)
  - [Billing Options](#)
  - [Direct Pay Transaction ID](#)
  - [Employee Compact History](#)
  - [Employee Information Changes](#)
  - [Medicare Elig 65 Letters](#)
  - [Letter Notification](#)
  - [Life Insurance Premium](#)
  - [Medicare Adv HMO Auto Enroll](#)
  - [National Medical Support Order](#)
  - [OOP Eligibility History](#)
  - [Sick Leave History](#)
- Plan History**  
Tracks history of rates, department data, broadcast message and other data associated with NYSHIP.
  - [Broadcast Messages](#)
  - [Flat Rate Summary](#)
  - [Message Agent Log](#)
  - [Review NYBEAS/NYSTP JobCodes](#)
  - [Department Data](#)
  - [Agency Recon Report Inquiry](#)
- Transactions**  
Allows for the processing of NYBEAS transactions that change an enrollee's coverage.
  - [Benefit Plan Change](#)
  - [Benefit Program Change](#)
  - [Billing Option Change](#)
  - [Cancel Enrollment](#)
  - [Change Coverage](#)
  - [Comments](#)
  - [Contribution Rate Change](#)
  - [Corrections Requests](#)
  - [Dependent Add](#)
  - [Dependent/Beneficiary](#) 
  - [Dependent Delete](#)
  - [Empire Card Request/History](#)

(Please note not all HBA's screen may look identical as the one displayed above.)

7. Enter the enrollee's EmplID.

### Dependent/Beneficiary

Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

EmplID:

Last Name:

First Name:

Department:

**Include History**

[Basic Search](#)  [Save Search Criteria](#)

8. Select the Personal Profile tab.

**Name** | **Address** | **Personal Profile** 

**Holmes, Sherlock** EmplID: 555005566

**Dependent/Beneficiaries** [Find](#) | [View All](#) | First  Last

\*Dependent/Beneficiary ID:

**Dependent Name** [Find](#) | [View All](#) | First  Last

\*Effective Date:

Name: Watson, John [Edit Name](#)

9. Verify the following sets of information.
  - a. Relationship to Employee = Spouse/DP Imputed Income
  - b. Gender = same gender as the enrollee
  - c. Marital Status = Married
  - d. Marital Status Date = the same Marital Status Date on the marriage certificate, and the same date used for the enrollee.

**Personal History** Find | View All First 1 of 2 Last

\*Effective Date: 01/15/2012 Medicare Id:

\*Relationship to Employee: Spouse/DP Imputed Income

\*Dependent Beneficiary Type: Dependent

\*Gender: Male

\*Marital Status: Married As of: 01/15/2012  
 Student As of:   
 Disabled As of:

\*Dep. Proc. Type: No Disab Dep. End Date:

**Marital Status Date matches the Enrollee**

10. If the Personal History needs to be updated, make sure to hit the and update the information with the appropriate effective date.

11. After verifying the information for both the enrollee and their spouse, now go to: *Benefits -> Transactions -> Married-Marriage Equality Act.*

**Benefits**

Select benefit plans, track company cars & FMLA, calculate leave accrual & annuity, maintain primary job, NDT, FSA details, auto enrollment, COBRA, and merchants.

- History**
  - NYBEAS Update History
  - Archived Accounting
  - Billing Options
  - Direct Pay Transaction ID
  - Employee Compact History
  - Employee Information Changes
  - Medicare Elig 65 Letters
  - Letter Notification
  - Life Insurance Premium
  - Medicare Adv HMO Auto Enroll
  - National Medical Support Order
  - OOP Eligibility History
  - Sick Leave History
  - OSC Salary Grade Inquiry
  - OSC Unsettled Group
  - Blue Cross
- Plan History**
  - Broadcast Messages
  - Flat Rate Summary
  - Message Agent Log
  - Review NYBEAS/NYSTEP JobCodes
  - Department Data
  - Agency Recon Report Inquiry
- Transactions**
  - Benefit Plan Change
  - Benefit Program Change
  - Billing Option Change
  - Cancel Enrollment
  - Change Coverage
  - Comments
  - Contribution Rate Change
  - Corrections Requests
  - Dependent Add
  - Dependent/Beneficiary
  - Dependent Delete
  - Empire Card Request/History
  - Enroll/Waive Benefits
  - Federal Qualification Change
  - Letter Notification
  - Married-Marriage Equality Act

12. Enter the enrollee's EmplID.

### Marriage Equality Act

Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

EmplID:   

Empl Rcd Nbr:

Last Name:

First Name:

Department:

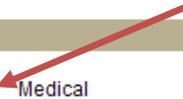
Case Sensitive

[Basic Search](#)  [Save Search Criteria](#)

13. Enter the plan type of "10" for Medical coverage.

**Marriage Equality Act**

**Employee Information**  
**Holmes, Sherlock** EmplID: 555005566 Empl Rcd #: 0

**Select Plan Type**  
 \*Plan Type:     COBRA Event ID: 0

**Enrollee's Current Coverage Information**

Eff Date	Event Id	Covrg Elect	Benefit Plan	Coverage
09/27/2012	0	Elect	001 The Empire Plan	Family
A02 PEF w/ Rx (Dental/Vision) BW			Med Primacy <input type="checkbox"/>	Med Reimbursement <input type="checkbox"/> 

**Enrollee Current Details**

Effdt - Event ID	Company	Pay Group	Cust ID	Billing Status	Paymt Method	Tax Elect	Rate Share	Sick Leave	PEP Amount
09/27/2012 0	NYS	Adm/Lag/BW	00001	Regular	OPAY	B B	84/69	0.00	0.00
A02 PEF w/ Rx (Dental/Vision) BW				Imputed Income: Y					

**Transaction Details**

*Action	*Reason	Event Dt	Request Dt	Effective Dt	Override
<input type="text" value="DEP"/>	<input type="text" value="MEA"/>	<input type="text" value="01/15/2012"/>	<input type="text"/>	<input type="text" value="01/15/2012"/>	<input type="text" value="No"/>  

Married-Marriage Equality Act

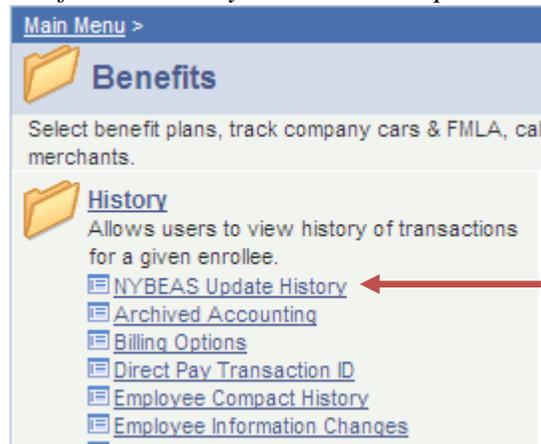
Watson, John

14. Don't forget to  the transaction!

15. Now process for plan type 11 (Dental) and/or 14 (Vision), if the spouse is covered as a dependent for Dental and/or Vision coverage through NYSHIP.

## How to verify the imputed income for NYS and Federal Tax Purposes

1. After processing the transaction, the next day you can verify the billing is accurate. Go to *Benefits* → *History* → *NYBEAS Update History* and select the Accounting page.



2. When using the Accounting page, change the Record type to “I” and Tax Type to “A” to verify the Imputed Income for NYS tax purposes has been reversed and is no longer being assessed.

In the example below, note the removal of imputed income for the 2012 tax year.

Record Type:  \*Tax Type:  Refresh Data Ending Balance: -3798.28

Employee Account Details											View All	First	1-7 of 56	Last
Activity Date	Billing Period Begin Date	Bill Type	Trans Type	Ben Prog	Ben Plan	Covg Cd	Bill Units	Tax Sts	Period Begin Date	Trans Amount	Running Balance			
10/04/2012			PMNT					A		-189.26	-3798.28	i		
10/03/2012	10/18/2012	RETR	CHRG	A01	001	4	-8	A	06/28/2012	-1514.08	-3609.02	i		
10/03/2012	10/18/2012	RETR	CHRG	A01	001	4	-12	A	01/12/2012	-2284.20	-2094.94	i		

3. To verify Imputed Income for Federal Tax purposes only, change the Record type to “I” and Tax Type to “F”.

Record Type:  \*Tax Type:  Refresh Data Ending Balance: 3987.54

Employee Account Details											View All	First	1-3 of 3	Last
Activity Date	Billing Period Begin Date	Bill Type	Trans Type	Ben Prog	Ben Plan	Covg Cd	Bill Units	Tax Sts	Period Begin Date	Trans Amount	Running Balance			
10/03/2012	10/18/2012	RGLR	CHRG	A01	001	4	1	F	10/18/2012	189.26	3987.54	i		
10/03/2012	10/18/2012	RETR	CHRG	A01	001	4	8	F	06/28/2012	1514.08	3798.28	i		
10/03/2012	10/18/2012	RETR	CHRG	A01	001	4	12	F	01/12/2012	2284.20	2284.20	i		