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NYBEAS TRANSACTION INSTRUCTIONS

Marriage Domestic Partner (DEP/MDP)

Purpose

The purpose of this transaction is to update an enrollee's existing domestic partner to spouse.

Pathway

Benefits > Transactions > Marriage Domestic Partner

Main Menu >

Benefits

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Documentation Required

- A copy of the marriage certificate
- A PS-404 (NYS or PEs) or PS-503.1 (PA) – Health Insurance Transaction Form with the Dependent Information completed

Instructions

1. Verify the enrollment record to ensure the transaction will process.
 - a. Go to: Benefits > History > NYBEAS Update History and enter the enrollee's EMPLID, then press the Search button.

NYBEAS Update History
At least one key field must be entered.

Usually the SSN

Find an Existing Value

EmplID: begins with ▾ 999999999

Empl Rcd Nbr: = ▾

Last Name: begins with ▾

First Name: begins with ▾

Department: begins with ▾

Case Sensitive

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

- b. Go to the "Dependents Tab" and review the dependent's information.
 - i. Verify the Relation says, "DomPartner" and that the Domestic Partner is on the coverage.

Card #'s Job Ben. Status Overrides Life History Personal **Dependents**

Employee Information
WESTMEIER, PAUL E EmplID: 999999999 Empl Rcd #: 0

Plan Type View All First 1 of 3 Last
Plan Type: Medical 10

Effective Dated
Effective Date: 04/02/2009 COBRA Event Id: 0
This should say "DomPartner" and they should be covered as a dependent.

Dependents Info View All First 1 of 1 Last

Person#	Name	SSN	Relation	Sex	Date of Birth	Med Prmy	Med Reimb	Med D Enrolled	Low Inc Subsidy	Fed Qual Sw
03	PAUL E WESTMEIER	999999999	DomPartner	Female	04/22/1955	<input type="checkbox"/>				

2. Process the Marriage Domestic Partner transaction.
 - a. Go to: Benefits > Transactions > Marriage Domestic Partner and enter the EMPLID and press the Search button.
 - b. Enter the appropriate **Plan Type** (10 = Medical, 11 = Dental, 14 = Vision).

- c. Enter the date of marriage in the **Event Dt** field.
- d. Enter the date the PS-404 / PS-503.1 was completed in the **Request Dt** field.
- e. The **Effective Dt** field should populate with the correct Effective Date.
- f. Click the Save button.

Marrying Domestic Partner

Employee Information
 EMPLOYEE, PHIL E EmplID: Empl Rcd #: 0

Select Plan Type
 *Plan Type: 10 Medical COBRA Event ID: 0

Enrollee's Current Coverage Information

Eff Date	Event Id	Covrg Elect	Benefit Plan	Coverage
04/02/2009	0	Elect	001 The Empire Plan	Family
	A09	PTR w/ Rx (Dent/Vis) BW	Med Primacy	Med Reimbursement

Enrollee Current Details

Effdt - Event ID	Company	Pay Group	Cust ID	Billing Status	Paymt Method	Tax Elect	Rate Share	Sick Leave	PEP Amount
01/01/2010 0	NYS	Adm/Lag/BW	00001	Regular	OPAY	B B	% Empl	0.00	0.00
	A09	PTR w/ Rx (Dent/Vis) BW							Imputed Income: Y

Transaction Details

*Action	*Reason	Event Dt	Request Dt	Effective Dt
DEP	MDP	07/01/2014	07/16/2014	07/01/2014
Marriage Domestic Partner				

Annotations:
 - Red arrow points from "This should be the date of marriage" to the Event Dt field.
 - Blue arrow points from "Date of the PS-404/PS-503.1" to the Request Dt field.

- 3. Review the enrollment record to ensure the Marriage Domestic Partner transaction updated the enrollee and dependent's marital status to "Married" and imputed income, if applicable, was ended effective the date of marriage.
 - a. Go to: Benefits > History > NYBEAS Update History and enter the enrollee's EMPLID, then press the Search button.
 - b. Verify the transaction processed on the Events tab for all Plan Types.

Events Benefits Medicare Part D Programs Billings Benefits/Billings

Employee Information
 EMPLOYEE, PHIL E EmplID: Empl Rcd #: 0

Plan Type
 Plan Type: Medical

Event Information

Action Date	Effective Date	Eff Seg	Action	Reason	CBR Evtld	Ovrd Sw	Source ID	Request Date	Event Date	User ID	Dep Info	Comment	Audit Info
02/24/2015	07/01/2014	0	DEP	Marriage Domestic Partner	0	N		07/16/2014	07/01/2014	TXC13			

Annotations:
 - Red arrow points from "This is the date of marriage" to the Effective Date field.
 - Blue arrow points from "This is the date on the PS-404/PS-503.1 Health Insurance Transaction Form" to the Request Date field.

- c. Verify the dependent's relationship status changed from Domestic Partner to Spouse on the Dependents tab. Make sure you click "View All" to see the dependent history and the current information.

Job Ben. Status Overrides Life History Personal Dependents Comments

Employee Information
 BRUNN, DANIEL E EmplID: 4748476 Empl Rcd #: 0

Plan Type View All First 1 of 2 Last

Plan Type: Medical 10

Effective Dated View 1 First 1-8 of 8 Last

Effective Date: 07/01/2014 COBRA Event Id: 0

Dependents Info View All First 1 of 1 Last

Person#	Name	SSN	Relation	Sex	Date of Birth	Med Prmy	Med Reimb	Med D Enrolled	Low Inc Subsidy	Fed Qual Sw
02	YVES BRUNN	481-12-1234	Spouse	Female	04/22/1955	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

AFTER!

Effective Date: 04/01/2005 COBRA Event Id: 0

Dependents Info View All First 1 of 1 Last

Person#	Name	SSN	Relation	Sex	Date of Birth	Med Prmy	Med Reimb	Med D Enrolled	Low Inc Subsidy	Fed Qual Sw
02	YVES BRUNN	481-12-1234	DomPartner	Female	04/22/1955	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

BEFORE

- d. Verify any imputed income, if applicable, ended effective the date of marriage on the Billings tab. The **Imp Inc** field should now say "N" instead of "Y" meaning that imputed income will no longer be assessed effective the date of marriage. If the domestic partner was previously Federally Qualified, then no change will be reflected on this field.

Programs Billings Benefits/Billings Accounting Card #'s Job

Employee Information
 BRUNN, DANIEL E Empl Rcd #: 0

Plan Type View All First 1 of 3 Last

Plan Type: The Imputed Income field should be updated to "N" for No Imputed Income effective the date of marriage.

Billings Details View All First 1-4 of 4 Last

Effective Date	CBR Evtld	Comp CustID	Rate Qual	Rate Share	Billing	Paygroup	Surchg %	Pay Meth	Tax Elect	Tax Flag	Imp Inc	Sick Leave Amt	PEP Amt
07/01/2014	0	NYS 00001	E	% Empl	Regular	Adm/Lag/BW 0		OPAY B	B	B	N	0.00	0.00
01/01/2010	0	NYS 00001	E	% Empl	Regular	Adm/Lag/BW 0		OPAY B	B	B	Y	0.00	0.00
04/02/2009	0	NYS 00001	E	% Empl	Regular	Adm/Lag/BW 0		OPAY B	S	S	Y	0.00	0.00
05/10/1990	0	NYS 00001	E	% Empl	Regular	Adm/Lag/BW 0		OPAY B	B	B	N	0.00	0.00

DON'T FORGET TO CHECK ALL PLAN TYPES