

## **Prior to Contacting the HBA Help Line Check List**

Please use this check list for reference for the most common issues and concerns faced by HBAs. If you are not the HBA, please consult your agency's HBA for additional assistance. An HBA should contact the HBA Help Line if you and/or your enrollees require assistance after reviewing the items in the check list.

### **NYSHIP Eligibility Rules/Waiting Periods/Effective Dates**

- HBA Online Manual
- NYSHIP General Information Book
- Payroll Calendar

### **NYSHIP Enrollee and Dependent Proofs**

- HBA Online Manual
- HBA Online Policy Memos
- HBA Online HBA Memos
- NYSHIP General Information Book

### **NYBEAS Processing Instructions**

- HBA Online Manual

### **Questions from Enrollees Regarding Deductions**

- NYBEAS Review:
  - Job Panel
  - Accounting, Benefits and Billings panels
  - Comments
- HBA Online Manual (effective dates, when deductions begin)
- Payroll Calendar
- NYSHIP Online Resources Page
  - How to Read your Biweekly Billing Statement

### **Correction Requests or Sending Correspondence**

- Requesting an update to an employee's Job record:
  - Confirm NYSTEP and/or PayServ is reflecting the change. EBD cannot process the request until NYSTEP is updated.
- Requesting Benefits Enrollment updates
  - Ensure all documentation is readily available should EBD request. Note: You should always fax or mail all documentation when you are requesting an effective date that is more than 30 days in the past.

### **Following Up on Correction Request or Sending Correspondence**

- Review your Correction Request Worklist to see if a Correction was processed or returned to you as Invalid
  - Please allow up to 2 weeks for review/processing.
  - Comments within the Correction Request will also update you if further information is needed.
- Confirm correspondence sent to EBD has been completed by checking appropriate NYBEAS panels and comments.
  - Please allow up to 4 weeks for review/processing

### **Specific Topics (Opt-out, Productivity Enhancement PEP, Pre-Tax Contribution Program, Annual Option Transfer Period, Rates and Deadlines, Leaves of Absence, Retirement, Vesting, COBRA, National Medical Support Orders)**

- HBA Online Manual
- HBA Online HBA Memos
- HBA Online Policy Memos
- NYSHIP General Information Book
- NYSHIP Online Publications
- System Announcements
- Employee Benefit Fund/Union Contracts
- New York State Employee Cafeteria Plan