



**Department of
Civil Service**

New York Benefits Eligibility and Accounting System (NYBEAS)

Employee Benefits Division

May 19, 2021

Topics

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2. Looking Up an Enrollee
3. How to Navigate Through an Enrollees Account
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5. Enrolling a New Hire/Newly Eligible Employee into Coverage
6. NYBEAS Comments
7. How to Process Retirements
8. How to Process Medicare Changes
9. How to Process COBRA Enrollments
10. HBA Online E-Learning

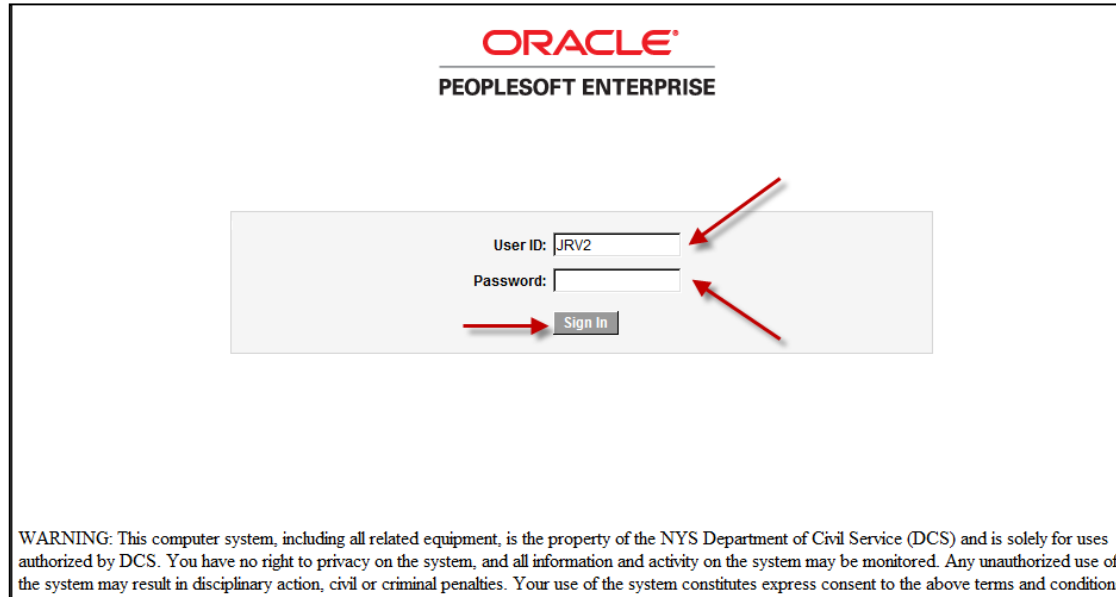
NYBEAS Access

- Agencies that participate in NYSHIP are required to have access to the New York Benefits Eligibility and Accounting System (NYBEAS), to process enrollment transactions related to NYSHIP participation
- Access to NYBEAS may only be granted to an agency's Health Benefits Administrator (HBA)

NYBEAS Access

- The Data Access Officer (DAO) at your agency is designated to permit and terminate NYBEAS access
- [HBA Memo PA 18-02 NYBEAS Access and HBA Online Access](#)

NYBEAS Login



ORACLE
PEOPLESOFT ENTERPRISE

User ID:

Password:

WARNING: This computer system, including all related equipment, is the property of the NYS Department of Civil Service (DCS) and is solely for uses authorized by DCS. You have no right to privacy on the system, and all information and activity on the system may be monitored. Any unauthorized use of the system may result in disciplinary action, civil or criminal penalties. Your use of the system constitutes express consent to the above terms and conditions.

<https://nybeas.cs.state.ny.us/psp/NYBEAS/?cmd=login&languageCd=ENG&>

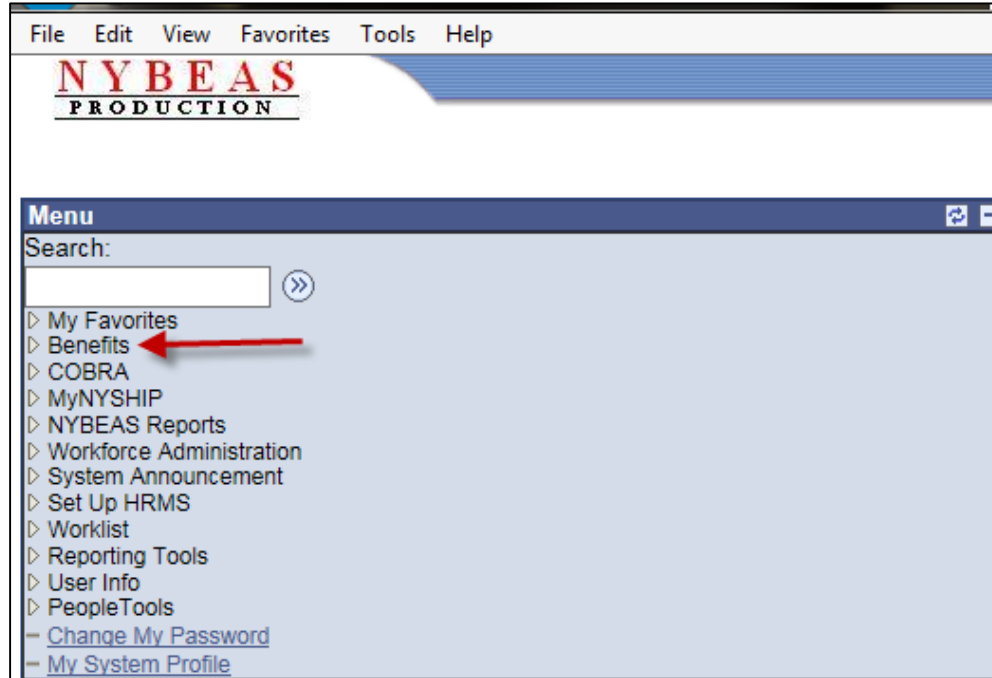
NYBEAS Access

- Requests for NYBEAS password resets should be sent to the Office of Information Technology Service Desk. You may reach them:
 - by phone at **1-844-891-1786**
 - by e-mail at fixit@its.ny.gov
 - by submitting a request online via the ITS Service Portal at <https://nysitsm2.service-now.com/sp/>

How to Look Up an Enrollee



Click **Benefits** from the Main Menu



Under the **History** folder, click on **NYBEAS Update History**

NYBEAS PRODUCTION

Menu

Search:

- My Favorites
- Benefits**
 - History
 - Plan History
 - Transactions
- COBRA
- MyNYSHIP
- NYBEAS Reports
- Workforce Administration
- System Announcement
- Set Up HRMS
- Worklist
- Reporting Tools
- User Info
- PeopleTools
- [Change My Password](#)
- [My System Profile](#)

Main Menu >

Benefits

Select benefit plans, track company cars & FMLA, calculate leave accrual & annuity, maintain p

History

Allows users to view history of transactions for a given enrollee.

- [NYBEAS Update History](#)
- [Archived Accounting](#)
- [Billing Options](#)
- [Employee Information Changes](#)
- [Letter Notification](#)
- [National Medical Support Order](#)
- [CMS/RDS Data](#)
- [DEAS](#)
- [PEP](#)
- [Search](#)

Enter the enrollee's SSN (EmplID) and click **Search**

NYBEAS
PRODUCTION

Menu

Search:

- My Favorites
- Benefits
 - History
 - CMS/RDS Data
 - DEAS
 - PEP
 - Search
 - NYBEAS Update History**
 - Archived Accounting
 - Billing Options
 - Employee Information Changes
 - Letter Notification
 - National Medical Support Order
- Plan History
- Transactions
- COBRA
- MyNYSHIP
- NYBEAS Reports

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

Find an Existing Value

EmplID: begins with x

Empl Rcd Nbr: =

Last Name: begins with

First Name: begins with

Department: begins with

Case Sensitive

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

NYBEAS Update History will appear

Menu

Search:

- ▶ My Favorites
- ▼ Benefits
 - ▼ History
 - ▶ CMS/RDS Data
 - ▶ DEAS
 - ▶ PEP
 - ▶ Search
 - NYBEAS Update History
 - Archived Accounting
 - Billing Options
 - Employee Information Changes
 - Letter Notification
 - National Medical Support Order
- ▶ Plan History
- ▶ Transactions
- ▶ COBRA
- ▶ MyNYSHIP
- ▶ NYBEAS Reports
- ▶ Workforce Administration
- ▶ System Announcement
- ▶ Set Up HRMS
- ▶ Worklist
- ▶ Reporting Tools
- ▶ User Info
- ▶ PeopleTools
- Change My Password
- My System Profile

Events
Benefits
Medicare Part D
Hold Harmless
Programs
Billings
▶

Employee Information

JONES, MIKE EmplID: 123456789 Empl Rcd #: 0

Plan Type View All First 1 of 1 Last

Plan Type: Medical 10

Event Information View All First 1-4 of 10 Last

Action Date	Effective Date	Eff Seq	Action	Reason	CBR Evtid	Ovr Sw	Source ID	Request Date	Event Date	User ID	Dep Info	Comment	View Audit Info
12/29/2012	01/01/2013	1	MPD	Medicare Part D Change	0	N	COMPINFC		01/01/2013	LYH			
12/29/2012	01/01/2013	0	MPD	Medicare Part D Change	0	N	COMPINFC		01/01/2013	LYH			
12/11/2008	12/01/2008	1	MED	Medicare Change	0	N			12/01/2008	DXD11			
12/11/2008	12/01/2008	0	PGM	Benefit Program Change	0	N	JOBUPDTE			DXD11			

Return to Search Previous in List Next in List Previous tab Next tab Refresh

[Events](#) | [Benefits](#) | [Medicare Part D](#) | [Hold Harmless](#) | [Programs](#) | [Billings](#) | [Benefits/Billings](#) | [Accounting](#) | [Card #'s](#) | [Job](#) | [Ben. Status](#) | [Personal](#) | [Dependents](#) | [Comments](#)

Search Folder

The screenshot displays the NYBEAS PRODUCTION web application interface. On the left is a navigation menu with the following items: My Favorites, Benefits (expanded), History, Plan History, Transactions, COBRA, MyNYSHIP, NYBEAS Reports, Workforce Administration, System Announcement, Set Up HRMS, Worklist, Reporting Tools, User Info, PeopleTools, Change My Password, and My System Profile. The main content area shows the 'Benefits' section with a description: 'Select benefit plans, track company cars & FMLA, calculate leave accrual & annuity, maintain p'. Below this is the 'History' section with a description: 'Allows users to view history of transactions for a given enrollee.' A list of links follows: NYBEAS Update History, Archived Accounting, Billing Options, Employee Information Changes, Letter Notification, National Medical Support Order, CMS/RDS Data, DEAS, PEP, and Search. A red arrow points to the 'Search' link.

NYBEAS PRODUCTION

Menu

Search:

- My Favorites
- Benefits**
- History
- Plan History
- Transactions
- COBRA
- MyNYSHIP
- NYBEAS Reports
- Workforce Administration
- System Announcement
- Set Up HRMS
- Worklist
- Reporting Tools
- User Info
- PeopleTools
- [Change My Password](#)
- [My System Profile](#)

Main Menu >

Benefits

Select benefit plans, track company cars & FMLA, calculate leave accrual & annuity, maintain p

History

Allows users to view history of transactions for a given enrollee.

- [NYBEAS Update History](#)
- [Archived Accounting](#)
- [Billing Options](#)
- [Employee Information Changes](#)
- [Letter Notification](#)
- [National Medical Support Order](#)
- [CMS/RDS Data](#)
- [DEAS](#)
- [PEP](#)
- [Search](#)

Here we see other methods of searching
an enrollee or dependent

The screenshot displays the NYBEAS PRODUCTION web application interface. On the left is a navigation menu with the following items: My Favorites, Benefits (expanded), History, Plan History, Transactions, COBRA, MyNYSHIP, NYBEAS Reports, Workforce Administration, System Announcement, Set Up HRMS, Worklist, Reporting Tools, User Info, PeopleTools, Change My Password, and My System Profile. The main content area is titled "Search" and includes a breadcrumb trail: Main Menu > Benefits > History >. Below the breadcrumb, a text box states: "This page allows users to search by National ID or Alternate ID. It also allows users to search on a Former COBRA ID and dependent name." Two search options are presented as buttons: "Search COBRA Former ID" (with a sub-label "Search COBRA Former ID") and "Search by Nat ID / Alt ID" (with a sub-label "Search by Nat ID / Alt ID"). Two red arrows point to these buttons from the text above. A "Home" link is visible in the top right corner of the application header.

Enter the National ID (SSN) or Alternate ID (Empire Plan Id Number) and click **Search**

Menu

Search:

- ▷ My Favorites
- ▽ Benefits
 - ▽ History
 - ▷ CMS/RDS Data
 - ▷ DEAS
 - ▷ PEP
 - ▽ Search
 - Search COBRA Former ID
 - Search by Nat ID / Alt ID
 - NYBEAS Update History

Search by National ID

National ID: Or Alternate ID:

*Search in: Search... Clear

Lookup by NID							Customize Find View All	First	1 of 1	Last
NID as stored	EmplID	Name	Alternate ID	Benefit Program	National ID Type	Inquire History	COBRA Event Summary			

Click the drop-down menu to search a dependent's SSN

Menu

Search:

- ▷ My Favorites
- ▽ Benefits
 - ▽ History
 - ▷ CMS/RDS Data
 - ▷ DEAS
 - ▷ PEP
 - ▽ Search
 - Search COBRA Former ID
 - Search by Nat ID / Alt ID
 - NYBEAS Update History

Search by National ID

National ID: Or Alternate ID:

*Search in: Dependents and Beneficiaries
Employees / Contingents / POI

Lookup by NID [Customize](#) | [Find](#) | [View All](#) | [First](#) | [1 of 1](#) | [Last](#)

NID as stored	EmplID	Name	Alternate ID	Benefit Program	National ID Type	Inquire History	COBRA Event Summary
						<input type="button" value="Inquire"/>	<input type="button" value="Summary"/>

Click **Inquire History** and the NYBEAS Update History Panel will appear

Search by National ID

National ID: Or Alternate ID:

*Search in:

Lookup by NID						Customize Find View All	First	1 of 1	Last
<u>NID as stored</u>	<u>EmpID</u>	<u>Name</u>	<u>Alternate ID</u>	<u>Benefit Program</u>	<u>National ID Type</u>	<u>Inquire History</u>	<u>COBRA Event Summary</u>		
999-99-9998	999999998	SAMPLE,SALLY	890672789	A02	Social Security Number				

Navigate to your desired screen and click the **Add to Favorites** link

NYBEAS PRODUCTION

Home Worklist **Add to Favorites**

Menu

Search:

My Favorites

Benefits

History

 ▷ CMS/RDS Data

 ▷ DEAS

 ▷ PEP

Search

 - Search COBRA Former ID

 - Search by Nat ID / Alt ID

 - NYBEAS Update History

 - Archived Accounting

Search by National ID

National ID: Or Alternate ID:

*Search in:

Lookup by NID Customize | Find | View All |

NID as stored	EmpID	Name	Alternate ID	Benefit Program	National ID Type	Inquire History	COBRA Event Summary
						<input type="button" value="Inquire History"/>	<input type="button" value="COBRA Event Summary"/>

How to Navigate Through an Enrollees Account



Events Panel: Lists in chronological order all benefit transactions that have been processed for this enrollee as well as the effective date of the change

Events [Benefits](#) [Medicare Part D](#) [Hold Harmless](#) [Programs](#) [Billings](#)

Employee Information
JONES, MIKE EmplID: 123456789 Empl Rcd #: 0

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

Event Information View All First 1-4 of 12 Last

Action Date	Effective Date	Eff Seq	Action	Reason	CBR Evtld	Ovrd Sw	Source ID	Request Date	Event Date	User ID	Dep Info	Comment	View Audit Info
02/09/2016	02/01/2016	0	CCO	Chg Ind - Voluntarily	0	N		01/31/2016		SKS2			
11/07/2015	01/01/2016	0	DEP	Age 19.25 or 26 no longer elig	0	N	COMPINFC		12/21/2015	PCONTROL			
09/30/2015	10/01/2015	2	COR	Correction - Update	0	N	HBUPDATE			JAM26			
09/30/2015	12/01/2015	1	COR	Correction - Delete	0	N	HBUPDATE			JAM26			

[Return to Search](#) [Previous tab](#) [Next tab](#) [Refresh](#)

[Events](#) | [Benefits](#) | [Medicare Part D](#) | [Hold Harmless](#) | [Programs](#) | [Billings](#) | [Benefits/Billings](#) | [Accounting](#) | [Card #'s](#) | [Job](#) | [Ben. Status](#) | [Personal](#) | [Dependents](#) | [Comments](#)

Click **“View All”** on the **“Event Information”** line to view all transactions processed on the enrollee’s file

Events | Benefits | Medicare Part D | Hold Harmless | Programs | Billings

Employee Information
JONES, MIKE EmplID: 123456789 Empl Rcd #: 0

Plan Type View All First 1 of 1 Last

Plan Type: Medical 10

Event Information View All | 1-4 of 12 Last

Action Date	Effective Date	Eff Seq	Action	Reason	CBR Evtld	Ovrd Sw	Source ID	Request Date	Event Date	User ID	Dep Info	Comment	View Audit Info
02/09/2016	02/01/2016	0	CCO	Chg Ind - Voluntarily	0	N		01/31/2016		SKS2			
11/07/2015	01/01/2016	0	DEP	Age 19,25 or 26 no longer elig	0	N	COMPINFC		12/21/2015	PCONTROL			
09/30/2015	10/01/2015	2	COR	Correction - Update	0	N	HBUPDATE			JAM26			
09/30/2015	12/01/2015	1	COR	Correction - Delete	0	N	HBUPDATE			JAM26			

Return to Search | Previous tab | Next tab | Refresh

Events | Benefits | Medicare Part D | Hold Harmless | Programs | Billings | Benefits/Billings | Accounting | Card #'s | Job | Ben. Status | Personal | Dependents | Comments

After you click “**View All**” you can now see all transactions on the record

Events																			
Benefits																			
Medicare Part D																			
Hold Harmless																			
Programs																			
Billings																			
Employee Information												EmplID: 123456789		Empl Rcd #: 0					
JONES, MIKE																			
Plan Type												View All		First		1 of 1		Last	
Plan Type: Medical 10																			
Event Information																			
View 4																			
First																			
1-12 of 12																			
Last																			
Action Date	Effective Date	Eff Seq	Action	Reason	CBR Evtld	Ovrd Sw	Source ID	Request Date	Event Date	User ID	Dep Info	Comment	View Audit Info						
02/09/2016	02/01/2016	0	CCO	Chg Ind - Voluntarily	0	N		01/31/2016		SKS2									
11/07/2015	01/01/2016	0	DEP	Age 19,25 or 26 no longer elig	0	N	COMPINFC		12/21/2015	PCONTROL									
09/30/2015	10/01/2015	2	COR	Correction - Update	0	N	HBUPDATE			JAM26									
09/30/2015	12/01/2015	1	COR	Correction - Delete	0	N	HBUPDATE			JAM26									
09/30/2015	12/01/2015	0	CCO	Chg Fam - Request Dep Coverage	0	N		10/01/2015		SKS2									
08/19/2015	10/01/2015	1	PGM	Benefit Program Change	0	N	JOBUPDTE			SKS2									
08/19/2015	10/01/2015	0	CCO	Chg Ind - Voluntarily	0	N		09/30/2015		SKS2									
09/07/2013	10/01/2013	0	DEP	Age 19,25 or 26 no longer elig	0	N	COMPINFC		09/25/2013	PCONTROL									
11/22/2010	01/01/2011	0	DEP	Add Dependent	0	N			01/01/2011	SKS2									
08/25/2009	09/01/2009	0	DEP	Delete Dep - Student Ext. Cov	0			05/30/2009	05/30/2009	SKS2									
10/14/2008	12/01/2008	1	ENR	Regular Enrollment	0	N		12/01/2008		SKS2									

Click **“View All”** on the **“Plan Type”** line to view all benefit types on the enrollee’s file

Events | Benefits | Medicare Part D | Hold Harmless | Programs | Billings

Employee Information
JONES, MIKE EmplID: 123456789 Empl Rcd #: 0

Plan Type View All First 1 of 2 Last

Plan Type: Medical 10

Event Information View All First 1-4 of 24 Last

Action Date	Effective Date	Eff Seq	Action	Reason	CBR Evtld id	Former	Ovrd Sw	Source ID	Request Date	Event Date	User ID	Dep Info	Comment	View Audit Info
04/06/2021	08/01/2010	16	COR	Correction - Insert	0		N	HBUPDATE			KLC8			
04/06/2021	10/01/2010	14	COR	Correction - Update	0		N	HBUPDATE			KLC8			
04/06/2021	01/01/2011	12	COR	Correction - Update	0		N	HBUPDATE			KLC8			
04/06/2021	01/01/2013	10	COR	Correction - Update	0		N	HBUPDATE			KLC8			

Return to Search Previous tab Next tab Refresh

Events | Benefits | Medicare Part D | Hold Harmless | Programs | Billings | Benefits/Billings | Accounting | Card #'s | Job | Ben. Status | Personal | Dependents | Comments

After you click “**View All**” you can now see information about the enrollee’s Medicare benefits in addition to their Medical benefits

Events | Benefits | Medicare Part D | Hold Harmless | Programs | Billings

Employee Information
JONES, MIKE EmplID:123456789 Empl Red #: 0

Plan Type: **Medical 10**

Action Date	Effective Date	Eff Seq	Action	Reason	CBR Evtid	Former Sw	Ovrd ID	Source	Request Date	Event Date	User ID	Dep Info	Comment	View Audit Info
04/18/2021	05/01/2021	0	MPD	Medicare Part D Change	0		N	COMPINFC		05/01/2021	PCONTROL			
04/08/2021	08/01/2010	18	COR	Correction - Insert	0		N	HBUPDATE			KLC8			
04/08/2021	10/01/2010	14	COR	Correction - Update	0		N	HBUPDATE			KLC8			
04/08/2021	01/01/2011	12	COR	Correction - Update	0		N	HBUPDATE			KLC8			

Plan Type: **Medicare 18**

Action Date	Effective Date	Eff Seq	Action	Reason	CBR Evtid	Ovrd Sw	Source	Request Date	Event Date	User ID	Dep Info	Comment	View Audit Info
04/08/2021	08/01/2010	17	COR	Correction - Medicare	0	N	HBUPDATE			KLC8			
04/08/2021	10/01/2010	15	COR	Correction - Medicare	0	N	HBUPDATE			KLC8			
04/08/2021	01/01/2011	13	COR	Correction - Medicare	0	N	HBUPDATE			KLC8			
04/08/2021	01/01/2013	11	COR	Correction - Medicare	0	N	HBUPDATE			KLC8			

Return to Search | Previous tab | Next tab | Refresh

Events | Benefits | Medicare Part D | Hold Harmless | Programs | Billings | Benefits/Billings | Accounting | Card #'s | Job | Ben. Status | Personal | Dependents

Benefits Panel: Outlines the current benefit status, coverage type, benefit program and Medicare status. You can also view any dependents covered under the policy

Events | **Benefits** | Medicare Part D | Hold Harmless | Programs | Billings

Employee Information
JONES, MIKE EmpID: 123456789 Empl Rcd #: 0

Plan Type View All First 1 of 2 Last

Plan Type: Medical 10

Benefits Details View All First 1-7 of 14 Last

Effective Date	Covrg ElectDt	Election	CBR EvtId	Ben Plan	Plan Descr	Covrg Desc	Ben Prog	Program	Med Prmy	Med Reimb	Med D Enrolled	Low Inc Subsidy	No-Drug Authorized	View Deps
05/01/2021	04/16/2021	Elect	0	001	Empire	Fam 3 Meds	PR7	PA7-Ret	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
03/01/2021	04/06/2021	Elect	0	001	Empire	Fam 3 Meds	PR7	PA7-Ret	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
09/01/2017	04/06/2021	Elect	0	001	Empire	Fam 2 Meds	PR7	PA7-Ret	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
09/01/2016	04/06/2021	Elect	0	001	Empire	Fam 2 Meds	PR7	PA7-Ret	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
11/01/2014	04/06/2021	Elect	0	001	Empire	Fam 2 Meds	PR7	PA7-Ret	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
02/01/2013	04/06/2021	Elect	0	001	Empire	Fam 2 Meds	PR7	PA7-Ret	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
01/01/2013	04/06/2021	Elect	0	001	Empire	Fam 2 Meds	PR7	PA7-Ret	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Return to Search | Previous tab | Next tab | Refresh

Events | Benefits | Medicare Part D | Hold Harmless | Programs | Billings | Benefits/Billings | Accounting | Card.#'s | Job | Ben. Status | Personal | Dependents | Co

Programs Panel: Shows the Benefit Program which can be used to determine if an enrollee is actively employed, retired, or in another non-active benefit status

Events
Benefits
Medicare Part D
Hold Harmless
Programs
Billings

Employee Information

JONES, MIKE
EmplID 123456789
Empl Rcd #: 0

Programs Info View All | First 1-2 of 2 Last

Effective Date	CBR EvtId	Benefit Program	Description	NYSHIP Drugs Indicator
10/01/2002	0	PR7	PA Option 7 (Retiree)	Y
04/01/1999	0	PA7	PA Option 7 (Actives)	Y

Return to Search
 Previous tab
 Next tab
 Refresh

[Events](#) | [Benefits](#) | [Medicare Part D](#) | [Hold Harmless](#) | [Programs](#) | [Billings](#) | [Benefits/Billings](#) | [Accounting](#) | [Card #'s](#) | [Job](#) | [B](#)

Billings Panel: Shows the billing and payment method for an enrollee (EPEN, TPEN,DIRP, APAY, etc.)

Events
Benefits
Medicare Part D
Hold Harmless
Programs
Billings

Employee Information

JONES, MIKE

EmplID: 123456789 Empl Rcd #: 0

Plan Type View

First	1-2 of 2	Last
-------	----------	------

Plan Type: Medical 10

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
08/01/2020	0	PA 03123	O	50/35	Regular	Mnthly-PA	0	EPEN A	A	A	N	0.00	0.00
02/01/2006	0	PA 03123	E	% Empl	Regular	Mnthly-PA	0	APAY A	A	A	N	0.00	0.00
07/01/2003	0	PA 03123	E	% Empl	Inactive	Mnthly-PA	0	APAY A	A	A	N	0.00	0.00
07/01/1998	0	PA 03123	E	% Empl	Regular	Mnthly-PA	0	APAY A	A	A	N	0.00	0.00

Plan Type: Medicare 18

Billings Details View All

First	1-2 of 2	Last
-------	----------	------

Effective Date	CBR Evtld	Comp CustID	Rate Qual	Rate Share	Billing	Paygroup	Surchg %	Pay Meth	Tax Elect	Tax Flag	Imp Inc	IRMAA Amt	MED B Diff
08/01/2020	0	PA 03123	E	% Empl	Regular	Mnthly-PA	0	EPEN A	A	A	N	0.00	0.00
06/01/2018	0	PA 03123	E	% Empl	Regular	Mnthly-PA	0	APAY A	A	A	N	0.00	0.00

Return to Search
Previous tab
Next tab
Refresh

[Events](#) | [Benefits](#) | [Medicare Part D](#) | [Hold Harmless](#) | [Programs](#) | [Billings](#) | [Benefits/Billings](#) | [Accounting](#) | [Card #'s](#) | [Job](#) | [Ben. Status](#)

Payment Methods

Payment Methods: (EPEN: Employee Retirement System Pension Deduction or TPEN: Teachers Retirement System Pension Deduction)

Select one of the following values:

APAY	Agency Pays
DIRP	Direct Pay
EPEN	ERS Pension Deduction
TPEN	TRS Pension Deduction

Cancel

Benefits/Billings Panel: Gives a description of the current coverage which corresponds with the amount and method in which the enrollee is billed

Employee Information																
JONES, MIKE											EmplID: 123456789	Empl Rcd #: 0				
Plan Type																
Plan Type: Medical 10											View 1	First	1-2 of 2	Last		
Benefits & Billing Details																
Benefits Details													View 5	First	1-11 of 11	Last
Effective Date	CBR EvtId	Covrg Elect	Covrg Elect Dt	Ben Plan	Short Description	Ben Pgm	Med Prmy	Med Reim	Med D Enrolled	Low Inc Subsidy	No-Drug Authorized					
06/01/2021	0	Elect	04/03/2021	001	Fam 2 Meds	PR7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
08/01/2020	0	Elect	04/13/2018	001	Fam 1 Med	PR7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
06/01/2018	0	Elect	04/13/2018	001	Fam 1 Med	PR7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
02/01/2011	0	Elect	02/08/2011	001	Family	PA7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
01/01/2011	0	Elect	11/02/2010	001	Family	PA7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
02/01/2010	0	Elect	02/06/2010	001	Family	PA7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
09/01/2006	0	Elect	08/02/2006	001	Family	PA7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
02/01/2006	0	Elect	01/18/2006	001	Family	PA7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
07/01/2003	0	Term	06/23/2003													
04/01/2003	0	Elect	11/26/2002	001	Family	PA7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
07/01/1998	0	Elect	07/01/1998	001	Family	PA7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					

Benefits/Billings Panel – View Benefits & Billing Details

Employee Information																											
JONES, MIKE																		EmplID 123456789		Empl Rcd #: 0							
Plan Type																											
Plan Type: Medical 10																				View 1		First		1-2 of 2		Last	
Benefits & Billing Details																											
View 5 First 1-11 of 11 Last																											
Effective Date	CBR EvtId	Covrg Elect	Covrg Elect Dt	Ben Plan	Short Description	Ben Pgm	Med Prmy	Med Reim	Med D Enrolled	Low Inc Subsidy	No-Drug Authorized	Comp	Pay Grp	CustID	Billing Descr	Pay Meth	Tax Elect	Tax Flag	Rate Share	Surchg %	Sick Leave Amt	Imp Inc	PEP Amt				
06/01/2021	0	Elect	04/03/2021	001	Fam 2 Meds	PR7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PA	MTH 03123	Regular	EPEN	A	A	50/35	0	0.00	N	0.00					
08/01/2020	0	Elect	04/13/2018	001	Fam 1 Med	PR7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PA	MTH 03123	Regular	EPEN	A	A	50/35	0	0.00	N	0.00					
06/01/2018	0	Elect	04/13/2018	001	Fam 1 Med	PR7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PA	MTH 03123	Regular	APAY	A	A	% Empl	0	0.00	N	0.00					
02/01/2011	0	Elect	02/08/2011	001	Family	PA7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PA	MTH 03123	Regular	APAY	A	A	% Empl	0	0.00	N	0.00					
01/01/2011	0	Elect	11/02/2010	001	Family	PA7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PA	MTH 03123	Regular	APAY	A	A	% Empl	0	0.00	N	0.00					
02/01/2010	0	Elect	02/06/2010	001	Family	PA7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PA	MTH 03123	Regular	APAY	A	A	% Empl	0	0.00	N	0.00					
09/01/2006	0	Elect	08/02/2006	001	Family	PA7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PA	MTH 03123	Regular	APAY	A	A	% Empl	0	0.00	N	0.00					
02/01/2006	0	Elect	01/18/2006	001	Family	PA7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PA	MTH 03123	Regular	APAY	A	A	% Empl	0	0.00	N	0.00					
07/01/2003	0	Term	06/23/2003		MTH																		0.00				
04/01/2003	0	Elect	11/26/2002	001	Family	PA7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PA	MTH 03123	Regular	APAY	A	A	% Empl	0	0.00	N	0.00					
07/01/1998	0	Elect	07/01/1998	001	Family	PA7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PA	MTH 03123	Regular	APAY	A	A	% Empl	0	0.00	N	0.00					

Accounting Panel: Shows the premium billing amount for EPEN/TPEN enrollees (No data will show for APAY enrollees)

[Programs](#) | [Billings](#) | [Benefits/Billings](#) | **Accounting** | [Card #'s](#) | [Job](#)

Employee Information

JONES, MIKE EmplID: 123456789

Record Type: *Tax Type: [Refresh Data](#) Ending Balance: 847.28

Employee Account Details View 7 | First 1-19 of 19 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	
04/02/2021	05/01/2021	RGLR	CHRG	PR7	001	B	1	A	05/01/2021	847.28	847.28	i
03/31/2021			PMNT					A		-847.28	0.00	i
03/05/2021	04/01/2021	RGLR	CHRG	PR7	001	B	1	A	04/01/2021	847.28	847.28	i
02/28/2021			PMNT					A		-926.54	0.00	i
02/05/2021	03/01/2021	RGLR	CHRG	PR7	001	B	1	A	03/01/2021	847.28	926.54	i
01/31/2021			PMNT					A		-999.00	79.26	i
12/31/2020			PMNT					A		-999.00	1078.26	i
12/31/2020	02/01/2021	RGLR	CHRG	PR7	001	B	1	A	02/01/2021	847.28	2077.26	i
12/04/2020	01/01/2021	RGLR	CHRG	PR7	001	B	1	A	01/01/2021	847.28	1229.98	i
11/30/2020			PMNT					A		-999.00	382.70	i
11/06/2020	12/01/2020	RGLR	CHRG	PR7	001	B	1	A	12/01/2020	1075.54	1381.70	i
10/31/2020			PMNT					A		-999.00	306.16	i
10/02/2020	11/01/2020	RGLR	CHRG	PR7	001	B	1	A	11/01/2020	1075.54	1305.16	i
09/30/2020			PMNT					A		-999.00	229.62	i
09/04/2020	10/01/2020	RGLR	CHRG	PR7	001	B	1	A	10/01/2020	1075.54	1228.62	i
08/31/2020			PMNT					A		-999.00	153.08	i
08/07/2020	09/01/2020	RGLR	CHRG	PR7	001	B	1	A	09/01/2020	1075.54	1152.08	i
07/31/2020			PMNT					A		-999.00	76.54	i
07/03/2020	08/01/2020	RGLR	CHRG	PR7	001	B	1	A	08/01/2020	1075.54	1075.54	i

Card #'s Panel: Shows the enrollees Empire Plan ID number as well as the most recent date a replacement card has been requested




Medicare Part D		Hold Harmless		Programs		Billings		Benefits/Billings		Accounting		Card #'s							
Employee Information																			
JONES, MIKE										EmplID 123456789		Empl Rcd #: 0							
Benefit Information																			
Effective Date: 06/01/2021		COBRA Evnt Id: 0		Covrg Elect: Elect		Covrg Code: Fam 2 Meds													
Benefit Program: PR7		PA Option 7 (Retiree)				Med Primacy <input checked="" type="checkbox"/>													
Benefit Plan: 001		Empire Plan		Med Reimbursement <input checked="" type="checkbox"/>															
Dependent's Card Information																			
												View All		First		1 of 4		Last	
Dep. / Benef. ID: 02		JONES, SAMANTHA																	
Card Type: DUP		Duplicate Card				Card Number: 890560917													
Relationship: Spouse																			
Request Date: 01/23/2014		Effective Date: 01/23/2014		User ID: LXD8				Process Date: 01/29/2014											
 Return to Search		 Previous tab		 Next tab		 Refresh													
Events Benefits Medicare Part D Hold Harmless Programs Billings Benefits/Billings Accounting Card #'s Job Ben.																			

Benefit Status Panel: Displays the date a particular job transaction will begin to affect benefit status

[Billings](#) | [Benefits/Billings](#) | [Accounting](#) | [Card #'s](#) | [Job](#) | **Ben. Status**

Employee Information

JONES, MIKE EmplID: 123456789 Empl Rcd #: 0

Benefit Employee Status View All |  First  1-2 of 2  Last

Effective Date	Eff. Seq.	Benefit Status	Status Description
01/19/2017			
03/30/2016		LWOP	Leave Without Pay

[Return to Search](#) | [Previous tab](#) | [Next tab](#) | [Refresh](#)

[Events](#) | [Benefits](#) | [Medicare Part D](#) | [Hold Harmless](#) | [Programs](#) | [Billings](#) | [Benefits/Billings](#) | [Accounting](#) | [Card #'s](#) | [Job](#) | [Ben. St](#)

Personal Panel: Shows the enrollees personal information such as mailing address, date of birth, marital status, hire date, Empire ID, Medicare ID and Retirement information

Card #'s		Job	Ben. Status	Overrides	Life History	Personal	Dependents
Employee Information							
JONES, MIKE						EmplID: 123456789	Empl Rcd #: 0
Personal Information							
Address 1: SUNNY STREET							
Address 2:							
Address 3:							
City / State: ALBANY NY						Gender:	Female
County: ALBANY						Date of Birth:	03/15/1948
Zip/Country: 12239 USA						Date of Death:	
Telephone: 518/999-9999						Marital Status:	Married
SSN: 999-99-9998						Marital Status Date:	09/24/1970
						Alternate ID:	890000000
Retirement Information				Employment Information			
Retirement Registration #:				Hire/Rehire Date: 01/27/1994 01/27/1994			
Retirement System: ERS				Termination Date:			
Retirement Tier: Tier IV				Last Date Worked:			
Retirement Number:				Service Date: 01/27/1994			
Retirement Type:				PayServ N ID:			
Medicare Id: 1A2B3C4D5E							

Dependents Panel: Shows all the dependents who have ever been covered under the policy along with effective dates of coverage

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

Employee Information

JONES, MIKE EmplID: 123456789 Empl Rcd #: 0

Plan Type View All First 1 of 1 Last

Plan Type: Medical 10

Effective Dated View All First 1 of 5 Last

Effective Date: 03/31/2020 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	SSN Solicit Attempts
04	Jones, Samantha	000-00-0001	Spouse	Female	12/31/1990	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

Return to Search Previous tab Next tab Refresh

Dependents Panel – View All

Accounting										Card #'s	Job	Ben. Status	Personal	Dependents	Comments				
Employee Information										JONES, MIKE									
										EmplID: 123456789 Empl Rcd #: 0									
Plan Type										View All First 1 of 1 Last									
Plan Type: Medical 10										NMSO									
Effective Dated										View 1 First 1-10 of 10 Last									
Effective Date: 01/01/2021										COBRA Event Id: 0									
Dependents Info										View All First 1-2 of 2 Last									
Person#	Name	SSN	Relation	Sex	Date of Birth	Med Prmy	Med Reimb	Med D Enrolled	Low Inc Subsidy	Fed Qual Sw									
04	Jones, Samantha	000-00-0001	Spouse	Female	12/31/1990	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	i <input checked="" type="checkbox"/>									
06	Jones, Lola	000-00-0000	Daughter	Female	10/31/2015	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	i <input checked="" type="checkbox"/>									
Effective Date: 08/12/2016										COBRA Event Id: 0									
Dependents Info										View All First 1-3 of 3 Last									
Person#	Name	SSN	Relation	Sex	Date of Birth	Med Prmy	Med Reimb	Med D Enrolled	Low Inc Subsidy	Fed Qual Sw									
03	Jones, Bella	000-00-0002	Daughter	Female	02/14/2012	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	i <input checked="" type="checkbox"/>									
04	Jones, Samantha	000-00-0001	Spouse	Female	12/31/1990	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	i <input checked="" type="checkbox"/>									
06	Jones, Lola	000-00-0000	Daughter	Female	10/31/2015	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	i <input checked="" type="checkbox"/>									
Effective Date: 07/01/2016										COBRA Event Id: 0									
Dependents Info										View All First 1-2 of 2 Last									
Person#	Name	SSN	Relation	Sex	Date of Birth	Med Prmy	Med Reimb	Med D Enrolled	Low Inc Subsidy	Fed Qual Sw									
03	Jones, Bella	000-00-0002	Daughter	Female	02/14/2012	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	i <input checked="" type="checkbox"/>									
04	Jones, Samantha	000-00-0001	Spouse	Female	12/31/1990	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	i <input checked="" type="checkbox"/>									

Comments Panel: Shows comments made by any NYBEAS user who has made a change to the enrollee's policy

The screenshot displays the NYBEAS system interface. At the top, there are navigation tabs: Accounting, Card #'s, Job, Ben. Status, Personal, Dependents, and Comments. The Comments tab is selected. Below the tabs, the name **JONES, MIKE** is displayed, along with **EmplID: 123456789** and **Empl Rcd #: 0**. The status is **Active**.

The **Comments** section is highlighted in blue. It includes a **View All** link, **First** and **Last** navigation buttons, and a page indicator **1 of 9**. Below this, the following information is shown:

- Dependent/Beneficiary ID:** 01
- Sequence:**
- Comment Date:** 03/16/2021
- Action Date:** 03/16/2021
- By:** MKJ2

The comment text reads: "NYBEAS Dependent Eligibility Letter sent confirming covered dependents. Enrollees must contact their HBA to notify them of any dependents who have lost eligibility for NYSHIP coverage. MKJ2 2021-03-16 12:30". A red arrow points to the **View All** link.

At the bottom, there are navigation buttons: **Return to Search**, **Previous in List**, **Next in List**, **Previous tab**, **Next tab**, and **Refresh**. Below these buttons are links for [Events](#), [Benefits](#), [Medicare Part D](#), [Hold Harmless](#), [Programs](#), [Billings](#), [Benefits/Billings](#), [Accounting](#), [Card #'s](#), [Job](#), and [Be](#).

Comments Panel – View All

Accounting		Card #'s	Job	Ben. Status	Personal	Dependents	Comments	
JONES, MIKE							EmplID: 123456789	Empl Rcd #: 0
Status: Active								
Comments View 1 First 1-9 of 9 Last								
Dependent/Beneficiary ID: 01		Sequence:						
Comment Date: 03/16/2021 Action Date: 03/16/2021 By: PCONTROL								
<div style="border: 1px solid gray; padding: 5px;"> NYBEAS Dependent Eligibility Letter sent confirming covered dependents. Enrollees must contact their HBA to notify them of any dependents who have lost eligibility for NYSHIP coverage. </div>								
Dependent/Beneficiary ID: 01		Sequence:						
Comment Date: 01/14/2020 Action Date: 01/14/2020 By: Amanda Perkins								
<div style="border: 1px solid gray; padding: 5px;"> Applied WOP extension through 6/1/20 per Filenet approval. EE has met her full year of a WOP. (AXP26 2020-01-14 11:27) </div>								
Dependent/Beneficiary ID: 01		Sequence:						
Comment Date: 11/14/2019 Action Date: 11/14/2019 By: Amanda Perkins								
<div style="border: 1px solid gray; padding: 5px;"> Applied WOP from 11/1/19-1/1/20 per Filenet approval. (AXP26 2019-11-14 14:40) </div>								
Dependent/Beneficiary ID: 01		Sequence:						
Comment Date: 10/15/2019 Action Date: 10/15/2019 By: Amanda Perkins								

Navigate to your desired screen and click the **New Window** Link

[New Window](#)

Events | **Benefits** | Medicare Part D | Hold Harmless | Programs | Billings

Employee Information
JONES, MIKE EmplID: 123456789 Empl Rcd #: 0

Plan Type View All First 1 of 2 Last

Plan Type: Medical 10

Event Information View All First 1-4 of 25 Last

Action Date	Effective Date	Eff Seq	Action	Reason	CBR Evtld id	Former	Ovrd Sw	Source ID	Request Date	Event Date	User ID	Dep Info	Comment	View Audit Info
04/16/2021	05/01/2021	0	MPD	Medicare Part D Change	0		N	COMPINFC		05/01/2021	PCONTROL			
04/06/2021	08/01/2010	16	COR	Correction - Insert	0		N	HBUPDATE			KLC8			
04/06/2021	10/01/2010	14	COR	Correction - Update	0		N	HBUPDATE			KLC8			
04/06/2021	01/01/2011	12	COR	Correction - Update	0		N	HBUPDATE			KLC8			

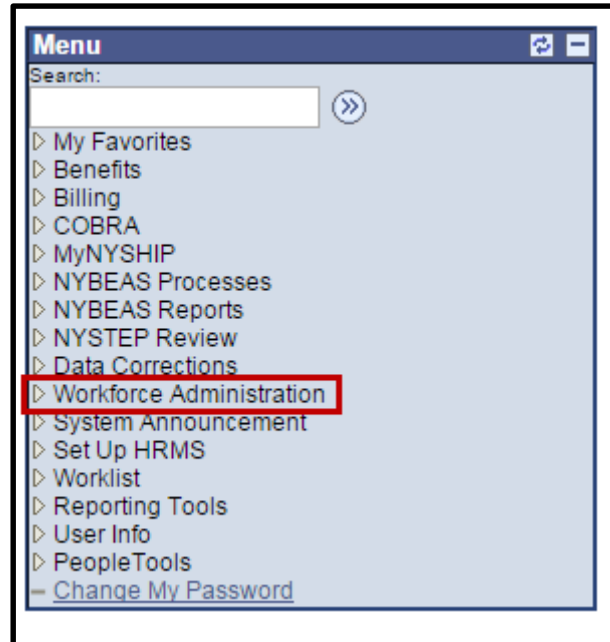
Return to Search | Previous tab | Next tab | Refresh

Events | Benefits | Medicare Part D | Hold Harmless | Programs | Billings | Benefits/Billings | Accounting | Card #'s | Job | Ben. Status | Personal | Dependents | Comments

Creating a New Job Record



To create a job record for a new employee you must enter their information into NYBEAS. From the NYBEAS homepage, select the **Workforce Administration** link



Under the **Hire** menu, choose **Enter Hire Data**

The screenshot shows a web application interface for Workforce Administration. At the top, there is a navigation bar with 'Main Menu >' and the title 'Workforce Administration'. Below the title is a descriptive sentence: 'Hire employees, add non-employees, maintain personal and job data, administer global assignments, labor relations, absence and vacation.' The main content area is divided into three columns, each with a folder icon and a title: 'Personal Information', 'Job Information', and 'Labor Administration'. Each column contains a list of sub-items. In the 'Hire' section, the 'Enter Hire Data' item is highlighted with a red box, and a red arrow points to it from the left.

[Main Menu >](#)

Workforce Administration

Hire employees, add non-employees, maintain personal and job data, administer global assignments, labor relations, absence and vacation.

- Personal Information**
Maintain information about a person regardless of Jobs.
 - [Manage Hires](#)
 - [Modify a Person](#)
 - [Biographical](#)
 - [Organizational Relationships](#)
- Job Information**
Maintain information about a person tied to a specific job record.
 - [Job Data](#)
 - [Rehire & Transfers](#)
 - [Percent Fill Change](#)
- Labor Administration**
Administer workforce agreements, layoffs, recalls and disciplinary actions.
 - [Union Workforce Mgmt Center](#)

Hire ←
Hire Transaction

- Enter Hire Data**
- [Review Hire Status](#)

Click on the **Select Template** drop-down menu and chose the **PA– Hiring Employees into PA** and then click **Go**

Hire

Choose a template and select Go to enter a new person. The Hires to Process section lists people you have previously started to enter who are in draft status. Select a name to continue the hire process. You have the option to delete people you do not intend to hire.

Add a New Person

Select Template:


ERV - Emergency Volunteer/Enroll.
PA - Hiring Employees into PA

Go

Draft Hires to Process

You do not have anyone in draft status.

Go To: [Template-Based Hire Status](#)

 Refresh


On the Enter Hire Details page, enter the **Employee ID Number** and the **Job Effective Date**. Then click **Next**

The following information is required before hiring, rehiring, adding, or renewing a Person.


Hire Details


Template: PA - Hiring Employees into PA

*EmpID:

*Job Effective Date: 

Action: Hire

*Reason Code: 

*Address Country: 

*Required Fields

On the Enter Employee Information page, under the **Name** section, enter the employee's first and last names using all capital letters. If the employee has a Suffix, use the drop-down box

Name

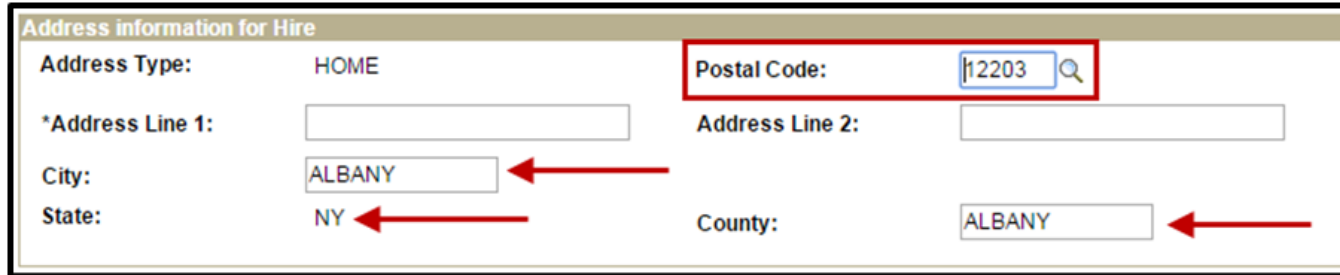
Name Prefix:

*First Name: Middle Name:

*Last Name:

Name Suffix:

In the Address Information for Hire section, enter the **employee's zip code FIRST** in the Postal Code field and hit the tab key. The City, State and County information will auto-populate




The screenshot displays a form titled "Address information for Hire" with the following fields and values:

Field	Value
Address Type:	HOME
Postal Code:	12203
*Address Line 1:	
Address Line 2:	
City:	ALBANY
State:	NY
County:	ALBANY

Red arrows point from the Postal Code field to the City, State, and County fields, indicating the flow of data. The Postal Code field is highlighted with a red border.


In the **Address 1** field, enter the employee's address using all capital letters

If they live in an apartment, enter the apartment number in the **Address 1** field and the street address in the **Address 2** field

Address information for Hire			
Address Type:	HOME	Postal Code:	12203 
*Address Line 1:	50 MAIN ST	Address Line 2:	
City:	ALBANY		
State:	NY	County:	ALBANY

If the employee has a post office box type it in as it appears in the following format: **PO BOX 123**.

If the employee is using a PO Box as their primary address, you will need to add a street address as their permanent address by using the **Personal/Employment** transaction

Address information for Hire			
Address Type:	HOME	Postal Code:	12203 
*Address Line 1:	50 MAIN ST	Address Line 2:	
City:	ALBANY		
State:	NY	County:	ALBANY

When Keying an Address

- USE ALL CAPITAL LETTERS
- Do not use punctuation
- There is a maximum of 23 characters per field
- Use abbreviations where possible.

Common Abbreviations Accepted by USPS

Primary Street Suffix Name	Postal Service Standard Suffix Abbreviation
Avenue	AVE
Boulevard	BLVD
Center	CTR
Circle	CIR
Court	CT
Drive	DR
Highway	HWY
Park	PARK
Parkway	PKWY
Plaza	PLZ
Road	RD
Route	RTE
Square	SQ
Street	ST
Terrace	TER
Turnpike	TPKE

For a list of standard abbreviations, go to the United States Postal Service website at www.usps.com.

In the **Telephone** field type in the employee's 10-digit phone number without dashes or parenthesis




Person Phone Number

Phone Type: 01-Home ▼

Telephone: 5185551212

Enter the employees **Date of Birth, Retirement System, and Retirement Tier**. If you do not have retirement information available, you can enter it later


Person Static data			
Date of Birth:	04/01/1992 	Medicare Id:	123456789A
Retirement System:	Employee's Retirement Syst. ▼	Retirement Type:	▼
Retirement Number:	<input type="text"/>	Retirement Tier:	Retirement Tier VI ▼
Retirement Registration#:	<input type="text"/>		

Do not enter the Retirement Number. (The retirement number is not assigned until the enrollee retires)

Under the **Personal Data for Hire** section, use the drop-down menus to add the employee's **Gender** and **Marital Status**. If there has been a change in marital status, enter the date that the change occurred in the **Marital Status Date** field

Personal Data for Hire	
*Gender:	Male ▼
*Marital Status:	Married ▼
Marital Status Date:	06/12/2012 [31]

In the **Job Date for Hire** section, enter the employee's agency code in the **Department** field. Click the magnifying glass and select the agency code

Job Data for Hire			
*Department:	<input type="text"/> 	Description:	
Company:	PA	Description:	MTH - Monthly - PA
Pay Group:	MTH	Description:	Participating Agency
Union Code:	PA	NYBEAS Job Code:	<input type="text" value="9999999"/> 
Employee Percent Filled:	100		

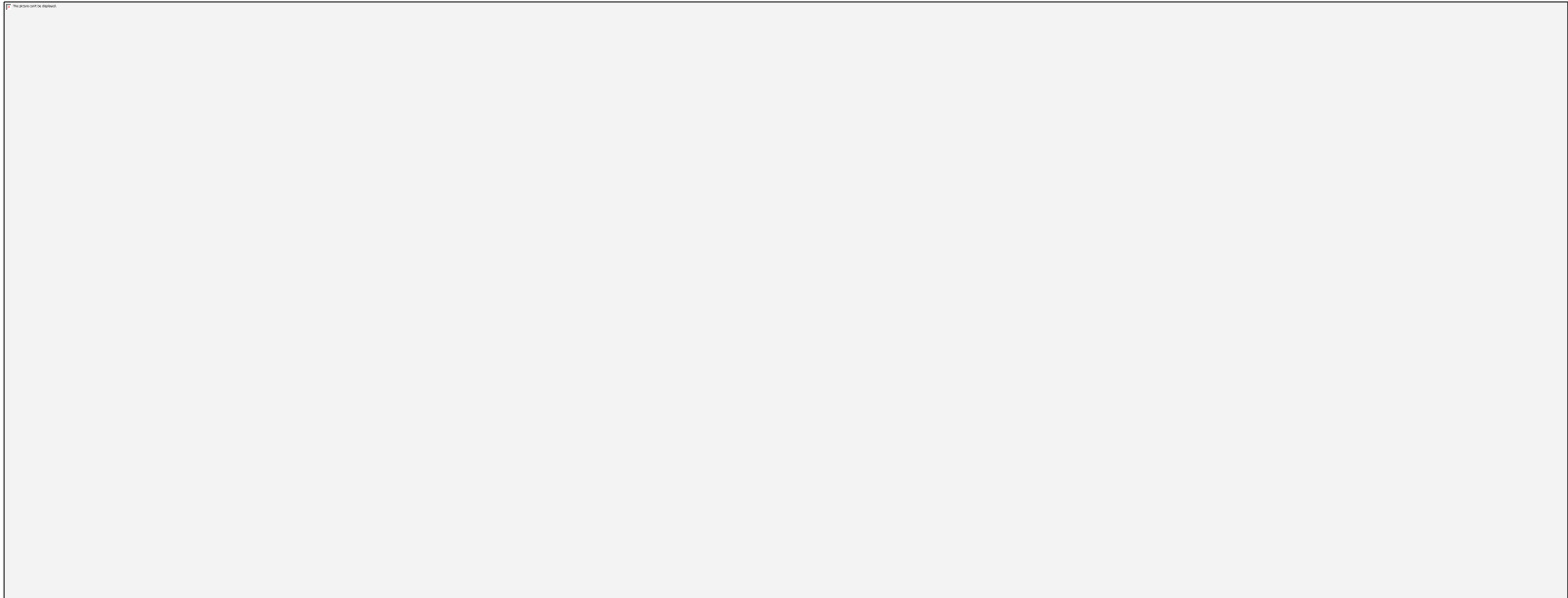
Enter the employee's **First Eligibility Date**. This is the first day the employee is eligible to enroll in coverage and cannot be prior to hire date

First Eligibility Date	
*First Eligibility Date:	<input type="text"/>

When you are finished entering information, click the **Save and Submit** button at the bottom of the page



If there was an error processing the hire transaction, you will see this warning



If this screen appears DO NOT try to correct the error or process the new hire again. Instead, click OK and call the HBA Helpline at (518) 474-2780 for assistance

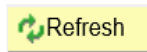
Hire

Further Processing Required



This person encountered errors while trying to save to the HR system and needs further processing. This request has been sent to the Human Resources department to complete the hire process.

Go to the Template-Based Hire Status page to review the status of this person.



If NYBEAS accepts the transaction you should see this screen. Click **OK** to finish the transaction



Next you need to enroll
the employee in benefits

How to Enroll a New Hire or Newly Eligible Employee into Coverage



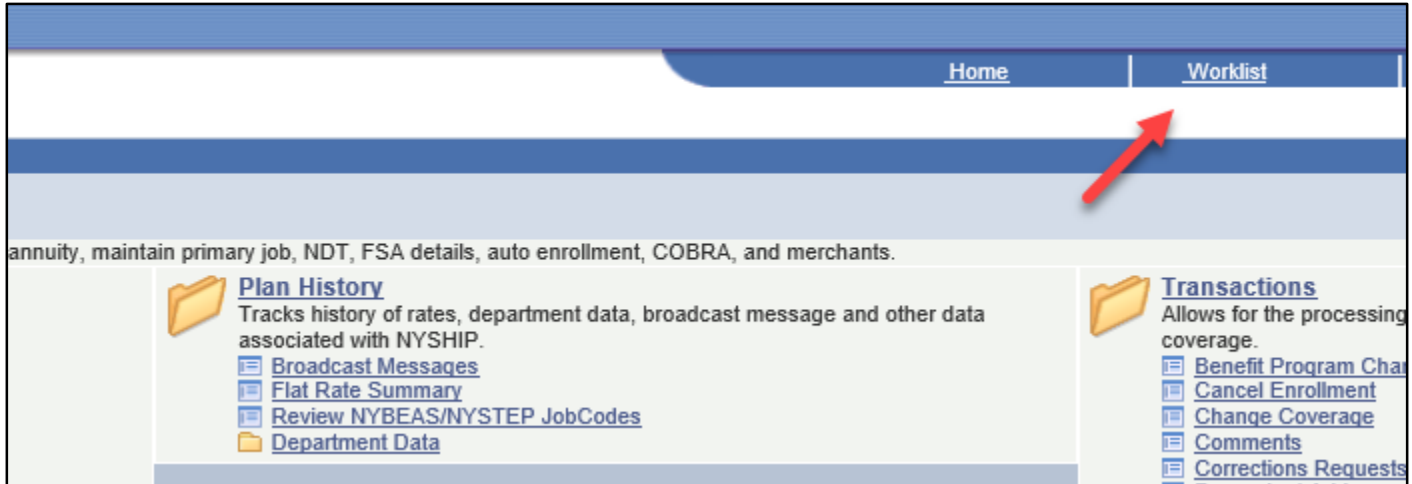
Enrolling a New Hire/Newly Eligible Employee into Coverage

- After you have processed the Hire transaction on Workforce Administration, you can enroll the employee into a NYSHIP health plan by using the Enroll/Waive Benefits transaction

OR

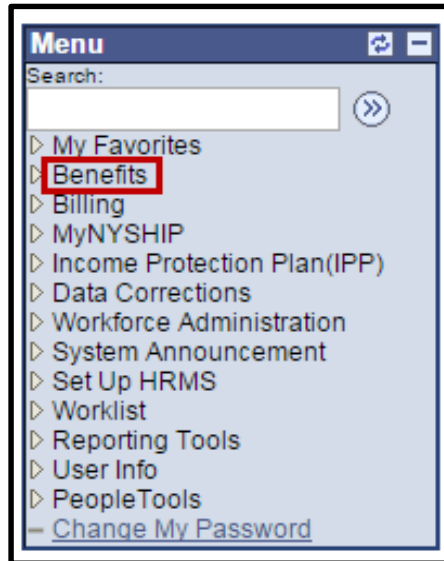
- You should find the employee on the New Enrollment Worklist. Using the New Enrollment worklist will bring you directly to the Enroll/Waive Benefits screen

Worklists can be found in the top right corner of your NYBEAS window



The screenshot displays the NYBEAS web application interface. At the top, there is a navigation bar with two tabs: 'Home' and 'Worklist'. The 'Worklist' tab is highlighted, and a red arrow points to it. Below the navigation bar, there is a main content area with a light blue background. On the left side, there is a section titled 'Plan History' with a folder icon, containing a description and several links: 'Broadcast Messages', 'Flat Rate Summary', 'Review NYBEAS/NYSTEP JobCodes', and 'Department Data'. On the right side, there is a section titled 'Transactions' with a folder icon, containing a description and several links: 'Benefit Program Cha', 'Cancel Enrollment', 'Change Coverage', 'Comments', and 'Corrections Requests'. The text 'annuity, maintain primary job, NDT, FSA details, auto enrollment, COBRA, and merchants.' is visible above the 'Plan History' section.

To enroll a new hire or newly eligible employee into coverage from the NYBEAS homepage, select **Benefits**



Under the Transactions menu, choose **Enroll/Waive Benefits**

The screenshot displays a web application interface with a navigation menu. At the top right, there are links for 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. Below this is a 'Main Menu >' section. The 'Benefits' section is expanded, showing three sub-menus: 'History', 'Plan History', and 'Transactions'. A red arrow points to the 'Transactions' sub-menu. Within the 'Transactions' sub-menu, the 'Enroll/Waive Benefits' option is highlighted with a red box.

Home | Worklist | Add to Favorites | Sign out

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](#)
- [Employee Information Changes](#)
- [Life Insurance Premium](#)
- [National Medical Support Order](#)
- [OOP Eligibility History](#)
- [Sick Leave History](#)
- [CMS/RDS Data](#)
- [DEAS](#)
- [PEP](#)
- [Search](#)

Plan History
Tracks history of rates, department data, broadcast message and other data associated with NYSHIP.

- [Broadcast Messages](#)
- [Flat Rate Summary](#)
- [Review NYBEAS/NYSTEP JobCodes](#)
- [Department Data](#)

Transactions
Allows for the processing of NYBEAS transactions that change an enrollee's coverage.

- [Benefit Plan Change](#)
- [Billing Option Change](#)
- [Cancel Enrollment](#)
- [Change Coverage](#)
- [Comments](#)
- [Contribution Rate Change](#)
- [Corrections Requests](#)
- [Unsettled Grp Contribution Chg](#)
- [Dependent Add](#)
- [Dependent/Beneficiary](#)
- [Dependent Delete](#)
- [Empire Card Request/History](#)
- [Enroll/Waive Benefits](#)**
- [Marriage Domestic Partner](#)
- [MRX Exception](#)
- [National Medical Support Order](#)
- [Personal / Employment](#)
- [Preferred Payment Change](#)
- [Sick Leave Adjustments](#)
- [Sick Leave Credit Preservation](#)
- [Tax Election Change](#)
- [OOP](#)
- [PEP](#)


Enter the **Employee's ID number** (usually their Social Security Number) in the **EmplID** field and Press **Search**

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

Find an Existing Value

EmplID:	begins with ▼	549120982
Empl Rcd Nbr:	= ▼	
Last Name:	begins with ▼	
First Name:	begins with ▼	
Department:	begins with ▼	

Case Sensitive

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

The Enroll/Waive Benefits screen will appear

Enroll/Waive Benefits

Employee Information

ENROLLEE, JOHN EmplID: 549120982 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
----------	----------	-------------	--------------	----------

Select Action

*Action	*Reason	Event Dt	Request Dt	Effective Dt	Override
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	No <input type="checkbox"/> <input type="button" value="OK"/>

Select Benefit Plan Information

Benefit Plan: Alternate ID:

Tax Election

Health Benefit Selection

Coverage Code: Medicare Primary ?

Medicare Reimbursable ?

Life Benefit Selection

Coverage Amt: Coverage Type: A

In the **Plan Type** field, enter **10** for Medical.

In the **Action** field, enter **ENR** for Enroll.

In the **Reason** field, enter **REG** for Regular Enrollment.

In the **Request Date** field, enter the signature date on the PS-503.

The **Effective Date** field will auto-populate


The screenshot displays a web form titled "Enroll/Waive Benefits". It is divided into several sections:

- Employee Information:** Shows "ENROLLEE,JOHN" and "EmplID: 546120982 Empl Rcd #: 0".
- Select Plan Type:** Features a dropdown menu with "10" selected, labeled "Medical", and "COBRA Event Id: 0".
- Select Action:** Contains several fields:
 - "*Action": A dropdown menu with "ENR" selected.
 - "*Reason": A dropdown menu with "REG" selected.
 - "Event Dt": An empty date field.
 - "Request Dt": A date field with "12/09/2015" entered.
 - "Effective Dt": A date field with "01/01/2016" entered.
 - "Override": A dropdown menu with "No" selected.

Red boxes in the original image highlight the "10" in the Plan Type field, the "ENR" and "REG" in the Action and Reason fields, and the "12/09/2015" and "01/01/2016" in the Request and Effective Date fields.


In the **Benefit Plan** field, click the magnifying glass to select the NYSHIP Plan your agency offers (Empire Plan or Excelsior Plan)

Select Benefit Plan Information

Benefit Plan:  The Empire Plan Alternate ID:

Tax Election After-Tax

Health Benefit Selection

Coverage Code:  Medicare Primary ?

Medicare Reimbursable ?

Look Up Benefit Plan

Search Results

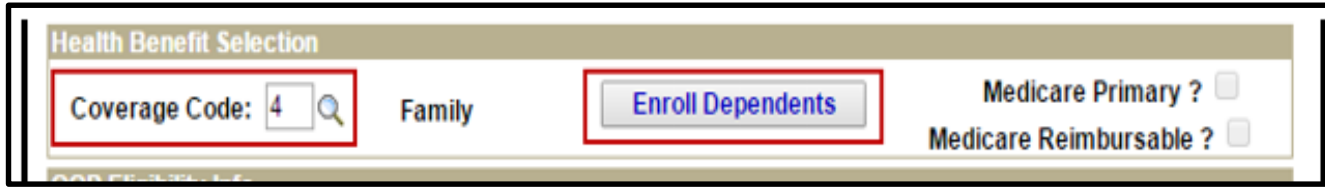
View All First 1-22 of 22 Last

Benefit Plan	Description
001	The Empire Plan

For Employee Only coverage (Individual) enter **1** in the **Coverage Code field** and press **Save**

Select Benefit Plan Information			
Benefit Plan:	<input type="text" value="001"/>	Empire Plan	Alternate ID:
Tax Election	<input type="text" value="A"/>	After-Tax	
Health Benefit Selection			
Coverage Code:	<input type="text" value="1"/>	Employee Only	Medicare Primary ? <input type="checkbox"/>
			Medicare Reimbursable ? <input type="checkbox"/>
<input type="button" value="Save"/>		<input type="button" value="Return to Search"/>	

For Family coverage, enter **4** in the **Coverage Code** field.
Next, click **Enroll Dependents** to add dependents to
coverage



The screenshot shows a "Health Benefit Selection" form. The "Coverage Code" field contains the number "4" and is highlighted with a red box. The "Family" option is selected, and the "Enroll Dependents" button is also highlighted with a red box. To the right, there are two checkboxes: "Medicare Primary ?" and "Medicare Reimbursable ?".

On the next screen, click **Add/Change Dependents** to add dependent info

Employee Information	
ENROLLEE,JOHN	EmplID: 546120982 Empl Rcd #: 0

Plan Type	
Plan Type: 10	Medical

[Add/Change Dependents](#) [Return to the Main Panel](#)

On the **Add/Change Dependent Data** page, enter a dependent's SSN, Date of Birth, and First and Last Name in all capital letters

Add/Change Dependent Data

Add Dependents Find | View All First 1 of 1 Last

Dependent/Beneficiary ID 02 COBRA Emplid: + -

SSN: **Birthdate:** 31

Same Phone as Employee **Date of Death:** 31

Elig. Adj(Mths):

Name

*Effective Date: 31 **Prefix::**


First Name: **Middle Name:**


Last Name: **Suffix:**

Name: Refresh Name

In the Address section, if a dependent's permanent address is the same as the enrollee's address, click the **Same Address as Employee** check box

Address

*Effective Date 

Same Address as Employee 

If the address is different than the enrollee's permanent address, double click the **Same Address as Employee** check box to enter a new address

Dependent Address

Address Type: 🔍

Postal Code: 🔍

Address Line 1:

Address Line 2:

City:

County:

State: Country: 🔍

Next, enter the dependent's **Relationship** to the enrollee, their **Gender**, and their **Marital Status**

Dependent Profile





*Effective Date:	05/01/2021	⌵	*Relationship:	Spouse	⌵
*Dependent Type:	Dependent	⌵	*Gender:	Female	⌵
*Marital Status:	Married	⌵	Marital Status Date:	02/14/2020	⌵
Student?	<input type="checkbox"/>		Student Status Date:		⌵
*Dep Proc. Type:	No Disab	⌵	Dep. End Date:		⌵
Medicare Id:					


OK Cancel

If you need to add additional dependents, click on the **blue plus sign** on the top right side of the screen. Repeat this step for each eligible dependent you are enrolling

Add/Change Dependent Data

Add Dependents Find | View All First 2 of 2 Last

Dependent/Beneficiary ID	03	COBRA Emplid:		 
SSN:	<input type="text" value="123-45-6789"/>	Birthdate:	<input type="text" value="01/01/1990"/> 	
Same Phone as Employee	<input checked="" type="checkbox"/>	Date of Death:	<input type="text"/> 	



When you are finished entering information click **OK**

Add/Change Dependent Data

Add Dependents Find | View All First 1 of 1 Last

Dependent/Beneficiary ID 02 COBRA Emplid:

SSN: Birthdate: BT

Same Phone as Employee Date of Death: BT

Elig. Adj(Mths):

Name

*Effective Date: BT Prefix::

First Name: Middle Name:

Last Name: Suffix:

Name: ENROLLEE,JANE

Address

*Effective Date: BT

Same Address as Employee

Dependent Profile

*Effective Date: BT *Relationship:

*Dependent Type: *Gender:

*Marital Status: Marital Status Date: BT

Student? Student Status Date: BT

*Dep Proc. Type: Dep. End Date:

Medicare Id:

Next you will see all the dependent(s) that you have input information for. Check the **Add Dependent** box next to each dependent being added to coverage. Then, click **Return to the Main Panel**

The screenshot displays a web interface for managing employee information. It is divided into several sections:

- Employee Information:** Shows the name "ENROLLEE,JOHN", "EmplID: 546120982", and "Empl Rcd #: 0".
- Plan Type:** Shows "Plan Type: 10 Medical".
- Buttons:** Two buttons are visible: "Add/Change Dependents" and "Return to the Main Panel". The "Return to the Main Panel" button is highlighted with a red border.
- Enroll Dependents:** A table with a blue header. The header includes "Enroll Dependents", "Find", "First", "1 of 1", and "Last". The table contains one row for a dependent:
 - 02 ENROLLEE,JANE
 - Spouse
 - DOB: 01/10/1985 123-69-8547
 - "Add Dependent" checkbox is checked and highlighted with a red border.
 - "Med Primary?" checkbox is unchecked.
 - "Med Reimbursable?" checkbox is unchecked.
 - "Fed Qualified?" checkbox is checked.

Finally, click **Save** on the bottom on page

Enroll/Waive Benefits

Employee Information
TEST,NYBEAS EmplID: 787878781 Empl Rcd #: 0

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

Select Action

*Action	*Reason	Event Dt	Request Dt	Effective Dt	Override
ENR	REG		01/01/2021	01/01/2021	No

Select Benefit Plan Information
Benefit Plan: 001 Empire Plan Alternate ID:
Tax Election: A After-Tax

Health Benefit Selection
Coverage Code: 4 Family [Enroll Dependents](#) Medicare Primary ?
Medicare Reimbursable ?

[Save](#) [Return to Search](#)

Once you have completed the transaction, be sure to check the NYBEAS Update History to make sure that the transaction was successful

NYBEAS Comments



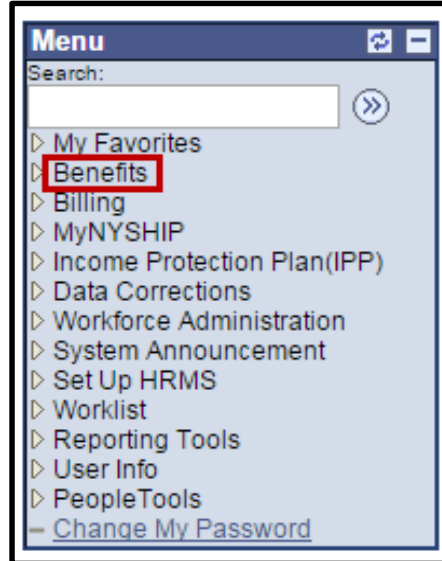
NYBEAS Comments

- Transaction used to note any communications with the employee and other events that are not captured by a NYBEAS Transaction
- For informational purposes only; does not update an enrollee's record
- The comments section should be used every time you receive a request or assist an employee
- When you create a comment in NYBEAS this information is not communicated to the Employee Benefits Division (EBD). If further action is required, you must process the transaction or contact EBD

Things to Note When Leaving Comments

- What was the employee's request?
- Is the employee benefits eligible?
- What forms were submitted and what date were they signed?
- List what proofs were received from the employee.
- What date were the forms and proofs received? Was it within the required timeframe?
- What was the date and name of the life or job event that prompted the transaction if there is one?
- What was the transaction being processed?
- Were there any delays in processing and why did they occur?

To access the **Comments** transaction, begin at the NYBEAS home screen and click the **Benefits** link



On the right-hand side of the screen, under the **Transactions** Menu, click the **Comments** link

The screenshot displays a web application interface with a 'Main Menu >' header. The menu is organized into three columns:

- 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](#)
 - [Employee Information Changes](#)
 - [Life Insurance Premium](#)
 - [National Medical Support Order](#)
 - [OOP Eligibility History](#)
 - [Sick Leave History](#)
 - [CMS/RDS Data](#)
 - [DEAS](#)
 - [PEP](#)
 - [Search](#)
- Plan History**: Tracks history of rates, department data, broadcast message and other data associated with NYSHIP.
 - [Broadcast Messages](#)
 - [Flat Rate Summary](#)
 - [Review NYBEAS/NYSTEP JobCodes](#)
 - [Department Data](#)
- Transactions**: Allows for the processing of NYBEAS transactions that change an enrollee's coverage.
 - [Benefit Plan 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](#)
 - [Marriage Domestic Partner](#)
 - [Modify a Person \(Link\)](#)
 - [MRX Exception](#)
 - [National Medical Support Order](#)
 - [Personal / Employment](#)
 - [Preferred Payment Change](#)
 - [Sick Leave Adjustments](#)
 - [Sick Leave Credit Preservation](#)
 - [Tax Election Change](#)
 - [Unsettled Grp Contribution Chg](#)
 - [Payment Tax Flag Change](#)
 - [OOP](#)
 - [PEP](#)

Enter the employee ID number (Social Security Number) in the **Employee ID** field and press **Search**

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

Find an Existing Value

EmpID: begins with ▼ 546120982


Empl Rcd Nbr: = ▼

Last Name: begins with ▼

First Name: begins with ▼

Department: begins with ▼

Case Sensitive

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




If there is an existing comment on this screen, click the **Blue Plus Sign** button at the top right of the panel to add a new comment



Benefit Comments

JONES, MIKE EmplID: 123456789 Empl Rcd #: 0

Employee Status: Retired


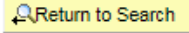
Dependent/Beneficiaries Find | View All First 1 of 2 Last


Dependent/Beneficiary ID: 01   

*Comment Date: 03/16/2021  Action Date: 03/16/2021 

Comments By: PCONTROL

Comment:
NYBEAS Dependent Eligibility Letter sent confirming covered dependents. Enrollees must contact their HBA to notify them of any dependents who have lost eligibility for NYSHIP coverage.

 Department of Civil Service

A new Comment box will appear. The **Comment Date** and **Action Date** will both auto-populate with today's date

Benefit Comments


JONES, MIKE



EmplID: 123456789

Empl Rcd #: 0

Employee Status: Retired



Dependent/Beneficiaries [Find](#) | [View All](#) [First](#) 2 of 3 [Last](#)

Dependent/Beneficiary ID: 

*Comment Date:  Action Date: 

Comments By:

Comment:

 Save Return to Search

Enter your full first and last name in the **Comments By** field and enter your notes in the **Comment** section

Benefit Comments


JONES, MIKE EmplID: 123456789 Empl Rcd #: 0


Employee Status: Retired

Dependent/Beneficiaries Find | View All First ◀ 2 of 3 ▶ Last

Dependent/Beneficiary ID:

*Comment Date: Action Date:

Comments By: 

Comment: 

At the time of retirement, enrollee was enrolled in a buyout program through the agency. |

When you are finished adding comments, click **Save**

Benefit Comments

JONES, MIKE EmplID: 123456789 Empl Rcd #: 0

Employee Status: Retired

Dependent/Beneficiaries Find | View All First 2 of 3 Last

Dependent/Beneficiary ID: 01

*Comment Date: 05/17/2021 Action Date: 05/17/2021

Comments By: Jessie Horton

Comment: At the time of retirement, enrollee was enrolled in a buyout program through the agency.

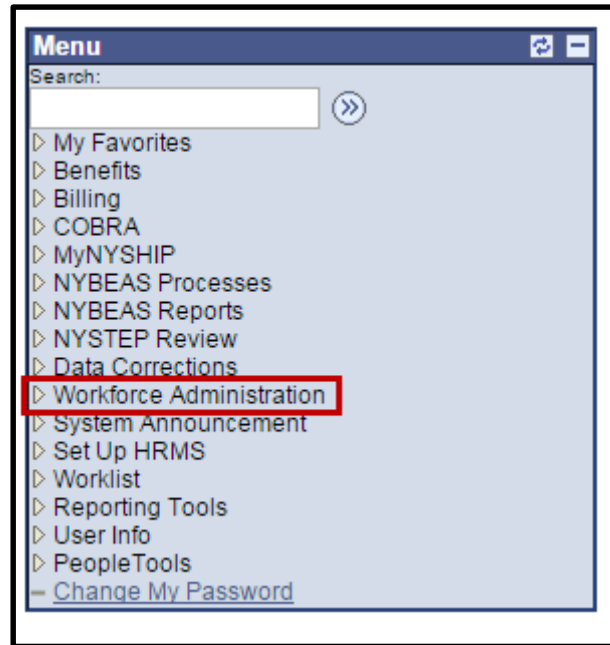
Save Return to Search

Once you have completed the transaction, be sure to check the NYBEAS Update History to make sure that the transaction was successful

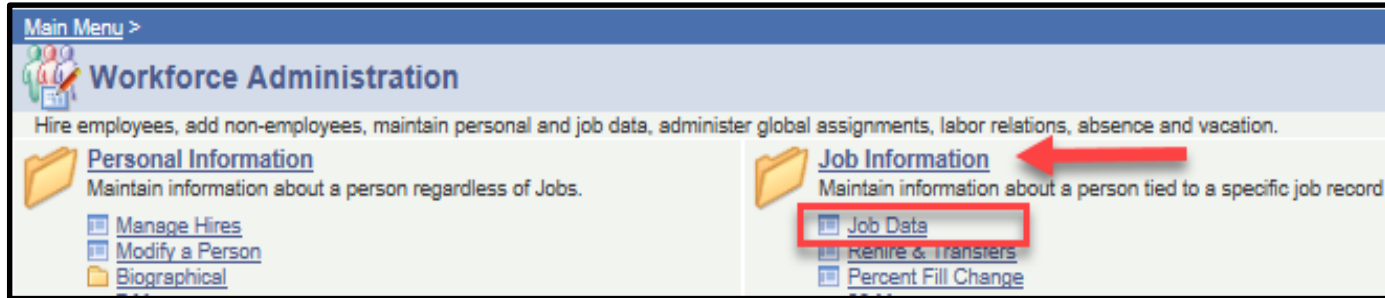
How to Process Retirements



To process a Retirement for an employee who is eligible to continue NYSHIP benefits in retirement, select **Workforce Administration** from the NYBEAS homepage



Under the Job Information menu, choose **Job Data**



The screenshot shows a software interface for Workforce Administration. At the top, there is a 'Main Menu >' link. Below it is the 'Workforce Administration' header with a sub-header: 'Hire employees, add non-employees, maintain personal and job data, administer global assignments, labor relations, absence and vacation.' The main content area is divided into two columns. The left column is titled 'Personal Information' and contains links for 'Manage Hires', 'Modify a Person', and 'Biographical'. The right column is titled 'Job Information' and contains links for 'Job Data', 'Renire & transfers', and 'Percent Fill Change'. A red arrow points to the 'Job Information' header, and a red box highlights the 'Job Data' link.

[Main Menu >](#)

Workforce Administration

Hire employees, add non-employees, maintain personal and job data, administer global assignments, labor relations, absence and vacation.

Personal Information
Maintain information about a person regardless of Jobs.

- [Manage Hires](#)
- [Modify a Person](#)
- [Biographical](#)

Job Information
Maintain information about a person tied to a specific job record

- [Job Data](#)
- [Renire & transfers](#)
- [Percent Fill Change](#)

Enter the EmplID and click **Search**

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

Find an Existing Value

EmplID: begins with ▾


Empl Rcd Nbr: = ▾

Last Name: begins with ▾

First Name: begins with ▾

Department: begins with ▾

Include History **Case Sensitive**

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

Click on the Plus sign to add a new row

Job Data Employment

Employee Info
JONES, MIKE EmplID: 123456789 Empl Rcd #: 0

Job Data Find | View All First ◀ 1 of 1 ▶ Last

Employee Status: Active ➔ + -

***Effective Date/Seq:** 02/27/2017 0 Current

***Action / Reason:** HIR HIR Hire **Action Date:** 03/07/2017

Department: 03853 Westbury Public Schools

Company: PA Participating Agency ***Pay Group:** MTH Monthly - PA

Negotiating Unit: PA Participating Agency

Employee % Filled: 100 **Source ID:** **Operator ID:** SXF10

Title Code: 9999999 Title Not Defined

Hire Date 02/27/2017 **Termination Date**

Rehire Date 02/27/2017

Benefit Program Find | View All First ◀ 1 of 1 ▶ Last

Effective Date: 03/01/2017 + -

Benefit Program: PA7 PA Option 7 (Actives)

Save Return to Search Previous tab Next tab Update/Display Include History

Job Data | [Employment](#)

The **Effective Date** will auto-populate to today's date. You need to update it to the date of the separation (retirement date)

Job Data		Employment	
Employee Info			
JONES, MIKE		EmplID: 123456789	Empl Rcd #: 0
Job Data Find View All First 1 of 2 Last			
Employee Status:	Active		
*Effective Date/Seq:	05/12/2021	0	Current
Action / Reason:			Action Date: 05/12/2021
Department:	03853	Westbury Public Schools	
Company:	PA Participating Agency	*Pay Group:	MTH Monthly - PA
Negotiating Unit:	PA Participating Agency		
Employee % Filled:	100	Source ID:	Operator ID: OPPAUPD
Title Code:	9999999	Title Not Defined	
Hire Date	02/27/2017	Termination Date	
Rehire Date	02/27/2017		
Benefit Program Find View All First 1 of 1 Last			
Effective Date:	03/01/2017		
Benefit Program:	PA7 PA Option 7 (Actives)		
Save	Return to Search	Previous tab	Next tab
		Update/Display	Include History


Job Data | [Employment](#)

For the **Action Code**, select **RET-Retirement** from the drop-down menu.

Search Results

View All First ◀ 1-4 of 4 ▶ Last

<u>Action</u>	<u>Action Description</u>
LOA	Leave of Absence
RET	Retirement
RFL	Return from Leave
TER	Termination




For the **Reason Code**, select **RET- Regular Retirement** from the drop-down menu

Search Results

View All First ◀ 1 of 1 ▶ Last

<u>Reason Code</u>	<u>Description</u>
RET	Regular Retirement



When you are finished entering information, click **Save**

Job Data **Employment**

Employee Info
JONES, MIKE EmplID: 123456789 Empl Rcd #: 0

Job Data Find | View All First 1 of 2 Last

Employee Status: Retired [+ -]

*Effective Date/Seq: 05/12/2021 [B] 0 Current

*Action / Reason: RET RET Regular Retirement Action Date: 05/12/2021

Department: 03853 Westbury Public Schools

Company: PA Participating Agency *Pay Group: MTH Monthly - PA

Negotiating Unit: PA Participating Agency

Employee % Filled: 100 Source ID: Operator ID: OPPAUPD

Title Code: 9999999 Title Not Defined

Hire Date 02/27/2017 Termination Date 05/11/2021

Rehire Date 02/27/2017 Last Date Worked 05/11/2021

Benefit Program Find | View All First 1 of 1 Last

Effective Date: 03/01/2017 [+ -]

Benefit Program: PA7 PA Option 7 (Actives)

Save Return to Search Previous tab Next tab Update/Display Include History

Job Data | [Employment](#)



As soon as you save a retirement transaction in Workforce Administration, you will receive this message, prompting you to process the **Preferred Payment Change**

If this retiree needs to have pension deductions started, complete the Preferred Payment Change Panel (24000,298)

If this retiree is in a retirement system and needs to have pension deductions started, the Preferred payment change panel must be completed, after this transaction is saved.

OK

Cancel

If the enrollee will pay for their coverage through pension deductions, you will now need to process a **Preferred Payment Change** to ERS or TRS Pension Deduction

If you received this warning, you must go into **Personal/Employment** and enter the Retirement System and Retirement Registration Number prior to processing a **Preferred Payment Change**



You will see this error message if the enrollee or any of their dependents are over the age of 65. You will need to update their Medicare Primacy by processing a **Medicare Change**



Once you have completed these transactions, be sure to check the NYBEAS Update History to make sure that the transactions were successful

How to Process Medicare Changes



Medicare Change

- To update Medicare primacy and Medicare primary billing, you must process a Medicare Change transaction
- Before you begin this transaction, check NYBEAS Update History to confirm the correct Medicare ID is reflected on the enrollee's record
 - An enrollee's Medicare ID can be found in the Personal panel of NYBEAS Update History
- If the enrollee's Medicare ID number is not already entered or needs to be updated, you must make the change by using the **Personal/Employment** transaction

Medicare Change for a Dependent

- Before you begin this transaction, check NYBEAS Update History to confirm the correct Medicare ID is reflected on the enrollee's record
- A dependent's Medicare ID can be found in the Benefits panel of NYBEAS Update History, by clicking the blue "i" icon under "View Deps"

Medicare Change for a Dependent

[Benefits](#) | [Medicare Part D](#) | [Hold Harmless](#) | [Programs](#) | [Billings](#) | [Benefits/Billings](#)








Employee Information

JONES, MIKE EmpID: 123456789 Empl Rcd #: 0

Plan Type View All First 1 of 2 Last

Plan Type: **Medical 10**

Benefits Details View All First 1-7 of 8 Last

Effective Date	Covrg ElectDt	Election	CBR EvtId	Ben Plan	Plan Descr	Covrg Desc	Ben Prog	Program	Med Prmy	Med Reimb	Med D Enrolled	Low Inc Subsidy	No-Drug Authorized	View Deps
06/01/2017	05/18/2017	Elect	0	001	Empire	Fam 2 Meds	PR7	PA7-Ret	✓	✓	✓	☐	☐	
05/01/2017	04/08/2017	Elect	0	001	Empire	Fam 2 Meds	PR7	PA7-Ret	✓	✓	✓	☐	☐	
03/01/2015	02/19/2015	Elect	0	001	Empire	Fam 1 Med	PR7	PA7-Ret	✓	✓	✓	☐	☐	
02/01/2015	01/03/2015	Elect	0	001	Empire	Fam 1 Med	PR7	PA7-Ret	✓	✓	☐	☐	☐	
07/01/2012	06/06/2012	Elect	0	001	Empire	Family	PR7	PA7-Ret	☐	☐	☐	☐	☐	
09/01/2009	04/27/2009	Elect	0	001	Empire	Family	PA7	PA7-Act	☐	☐	☐	☐	☐	
09/01/2001	09/17/2001	Elect	0	001	Empire	Family	PA7	PA7-Act	☐	☐	☐	☐	☐	

[Return to Search](#) | [Previous in List](#) | [Next in List](#) | [Previous tab](#) | [Next tab](#) | [Refresh](#)

[Events](#) | [Benefits](#) | [Medicare Part D](#) | [Hold Harmless](#) | [Programs](#) | [Billings](#) | [Benefits/Billings](#) | [Accounting](#) | [Card #'s](#) | [Job](#) | [Ben. Status](#) | [Personal](#) | [Dependents](#) | [Cor](#)

Medicare Change for a Dependent

Benefit Dependents Summary

Dependent Information		Find	First	1 of 1	Last
Person#: 02	Jones, Samantha	SSN:	000-00-0001		
Relationship: Spouse	Sex: Male	DOB:	10/31/2015		
Med Primacy <input checked="" type="checkbox"/>	Med Reimbursement <input checked="" type="checkbox"/>	Fed Qualified	<input checked="" type="checkbox"/>		
Dep. Medicare ID: 1A2B3C4D5E	Med D Enrolled <input checked="" type="checkbox"/>	Low Inc Eligible	<input type="checkbox"/>		

Return

Medicare Change for a Dependent

- To update a dependent's Medicare ID number, you must make the change by using the **Dependent/Beneficiary** transaction
- If you update a dependent's Medicare ID using the **Dependent/Beneficiary** transaction, make sure to use the Medicare primacy date as the effective date

Medicare Change for a Dependent

[Name](#) [Address](#) **Personal Profile**

JONES, MIKE EmplID: 123456789

Personal Profile Find | View All First 1 of 3 Last

Dependent/Beneficiary ID: 02 Name: Jones, Samantha

Date of Birth: 10/21/1965
Date of Death:
Medicare Entitled Date:
Elig Adj (Mths):

Personal History Find | View All First 1 of 4 Last

*Effective Date: 04/01/2021 Medicare Id 1A2B3C4D5E

*Relationship to Employee: Spouse
*Dependent Beneficiary Type: Dependent
*Sex: Female
*Marital Status: Unknown
 Student
 Disabled

As of:
End Date:
As of:

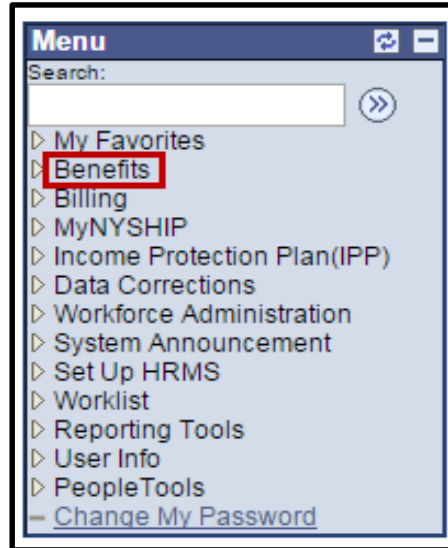
Medicare Change

- If the enrollee or dependent's Medicare Part A date is **before** the enrollee's retirement date, the Medicare primacy date will be the date the enrollee's status as an active employee changes to retiree (or date of enrollment in extended benefits for survivors, date of enrollment in survivor coverage, date of enrollment in COBRA, or date of enrollment in Vestee coverage)

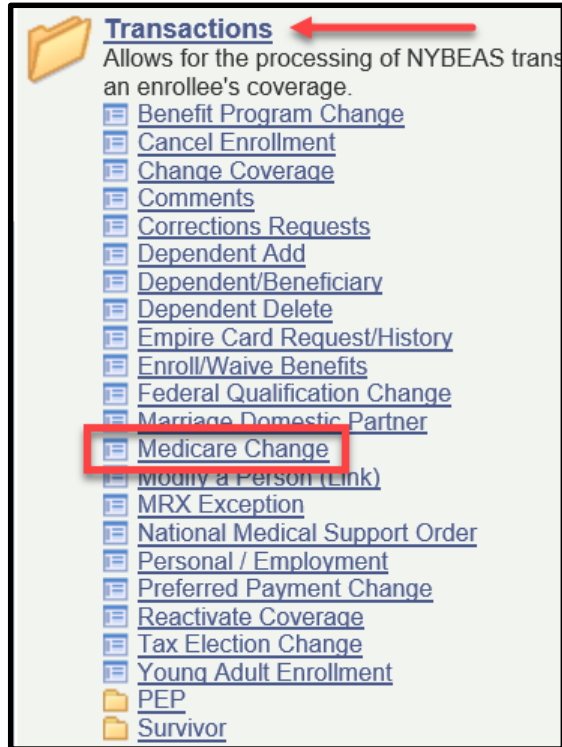
Medicare Change

- If the enrollee or dependent's Medicare Part A date is **after** the enrollee's retirement date (or date of enrollment in extended benefits for survivors, date of enrollment in survivor coverage, date of enrollment in COBRA, or date of enrollment in Vestee coverage), the Medicare primacy date will be effective on the Medicare Part A date

To process a Medicare Change transaction, select **Benefits** from the NYBEAS homepage



Under the **Transactions** Menu, choose **Medicare Change**



Select plan type **10** for Medical. Enter the Medicare Primacy date in the **Event Date** field, regardless if it is for the enrollee or the dependent

Medicare Change

ENROLLEE, JANE EmplID: 123456789 Empl Rcd #: 0

Plan Type

*Plan Type: Medical COBRA Event ID: 0

Enrollee's Current Coverage Information

Eff Date	Event Id	Covrg Elect	Benefit Plan	Coverage
02/01/2018	0	Elect	001 The Empire Plan	Fam 1 Med
PR7 PA Option 7 (Retiree)			Med Primacy <input type="checkbox"/>	Med Reimbursement <input type="checkbox"/>

Transaction Details

*Action	*Reason	Event Dt	Request Dt	Effective Dt	Override
MED	CHG	<input type="text" value="07/01/2019"/>	<input type="text"/>	<input type="text" value="07/01/2019"/>	No <input type="button" value="v"/>

Medicare Change

Enrollee Medicare Info

Medicare Change?: Y Med Primacy? Med Reimbursable? Medicare Id:

Once you have finished updating Medicare for the enrollee, click **Save**

Medicare Change

ENROLLEE, JANE EmplID: 123456789 Empl Rcd #: 0

Plan Type

*Plan Type: Medical COBRA Event ID: 0

Enrollee's Current Coverage Information

Eff Date	Event Id	Covrg Elect	Benefit Plan	Coverage
02/01/2018	0	Elect	001 The Empire Plan	Fam 1 Med
PR7 PA Option 7 (Retiree)			Med Primacy <input type="checkbox"/>	Med Reimbursement <input type="checkbox"/>

Transaction Details

*Action	*Reason	Event Dt	Request Dt	Effective Dt	Override
<input type="text" value="MED"/>	<input type="text" value="CHG"/>	<input type="text" value="07/01/2019"/>	<input type="text"/>	<input type="text" value="07/01/2019"/>	No <input type="checkbox"/>

Medicare Change

Enrollee Medicare Info

Medicare Change?: Y Med Primacy? Med Reimbursable? Medicare Id:

[Change Dependent Medicare Information](#)

If you are changing a dependent's Medicare to primacy, enter the dependent's Medicare primacy date in **Event Date** and click **Change Dependent Medicare Information**

Medicare Change

ENROLLEE, JANE EmplID: 123456789 Empl Rcd #: 0

Plan Type

*Plan Type: Medical COBRA Event ID: 0

Enrollee's Current Coverage Information

Eff Date	Event Id	Covrg Elect	Benefit Plan	Coverage
02/01/2018	0	Elect	001 The Empire Plan	Fam 1 Med
PR7 PA Option 7 (Retiree)			Med Primacy <input type="checkbox"/>	Med Reimbursement <input type="checkbox"/>

Transaction Details

*Action	*Reason	Event Dt	Request Dt	Effective Dt	Override
MED	CHG	<input type="text" value="07/01/2019"/>	<input type="text"/>	<input type="text" value="07/01/2019"/>	No <input type="checkbox"/>
Medicare Change					

Enrollee Medicare Info

Medicare Change?: N **Med Primacy?** **Med Reimbursable?** Medicare Id:

Change Dependent Medicare Information

Select the appropriate dependent and click Return to the Main Panel

ENROLLEE, JANE EmplID: 123456789 Empl Rcd #: 0

Plan Type
Plan Type: 10 Medical

[Return to the Main Panel](#)

Dependent Medicare Information Find | View All First ◀ 1 of 1 ▶ Last

02	DEPENDENT, ONE	SP Spouse	DOB: 01/11/1953
Change Dependent?:	N	Med Primacy? <input checked="" type="checkbox"/>	Med Reimbursable? <input checked="" type="checkbox"/> Fed Qualified? <input checked="" type="checkbox"/>

Dep. Medicare Id: 4X50GU1FA44

Click **Save** to complete

Medicare Change

ENROLLEE, JANE

EmplID: 123456789 Empl Rcd #: 0

Plan Type

*Plan Type:	10	Medical	COBRA Event ID: 0
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Enrollee's Current Coverage Information

Eff Date	Event Id	Covrg Elect	Benefit Plan	Coverage
02/01/2018	0	Elect	001 The Empire Plan	Fam 1 Med
		PR7 PA Option 7 (Retiree)	Med Primacy <input type="checkbox"/> Med Reimbursement <input type="checkbox"/>	

Transaction Details

*Action	*Reason	Event Dt	Request Dt	Effective Dt	Override
MED	CHG	07/01/2019		07/01/2019	No <input type="checkbox"/>
Medicare Change					

Enrollee Medicare Info

Medicare Change?:	Y	Med Primacy?	<input checked="" type="checkbox"/>	Med Reimbursable?	<input checked="" type="checkbox"/>	Medicare Id:	7NT5C64EK61
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Change Dependent Medicare Information

Save

Return to Search

Once you have completed the transaction, be sure to check the NYBEAS Update History to make sure that the transaction was successful

COBRA Enrollments

- The COBRA enrollment is a multi-step process that takes a minimum of two days to complete
- You must process the COBRA qualifying event before you begin processing the enrollment
- The COBRA-qualifying event is any involuntary cancellation, excluding cancellations due to non-payment, for members enrolled in Active or Retiree coverage (ex. divorce, job termination, cancellation due to age-ineligibility, death of the enrollee)
- Members whose Dependent Survivor Coverage is terminating due to age are also COBRA-eligible

COBRA Enrollments

- In the case of a divorce, you must change the status of the ex-spouse to divorced prior to processing their COBRA enrollment
- If the qualifying event is a Termination, once the termination is processed, you can skip the Insert COBRA Activity step and proceed to the Data Entry portion
- If the qualifying event is for the dependent(s) only, you can process the Insert COBRA Activity transaction the same day that the qualifying event was processed (Day 1)

Day 1 Insert COBRA Activity

- Establishing the COBRA qualifying event in NYBEAS will result in a COBRA enrollment. To establish a COBRA qualifying event, you must process an **Insert COBRA Activity** transaction. Once the transaction is processed, allow NYBEAS to update overnight

Select **COBRA** from the NYBEAS Homepage



From the **Managed Automated Participation** folder. Select **Insert COBRA Activity**

The screenshot displays a web application interface with two main panels. On the left is a 'Menu' panel with a search bar and a list of navigation items: 'My Favorites', 'Benefits', 'COBRA', 'MyNYSHIP', 'NYBEAS Reports', 'Workforce Administration', and 'System Announcement'. A red arrow points to the 'COBRA' item, which is expanded to show 'Administer COBRA Benefits'. On the right is the 'Main Menu >' panel, which contains a folder icon for 'COBRA' with a description: 'Allows for COBRA enrollment, review of processing results, creation of participant enrollment information, and tracking and terminating COB'. Below this is another folder icon for 'Manage Automated Participation' with a description: 'Manages and processes employee events related to automated qualification and administration of COBRA.'. Underneath are three menu items: 'COBRA Activity', 'Data Entry', and 'Insert Cobra Activity'. A red arrow points to the 'Insert Cobra Activity' item.

Menu

Search:

- My Favorites
- Benefits
- COBRA**
 - Administer COBRA Benefits
- MyNYSHIP
- NYBEAS Reports
- Workforce Administration
- System Announcement

Main Menu >

COBRA
Allows for COBRA enrollment, review of processing results, creation of participant enrollment information, and tracking and terminating COB

Manage Automated Participation
Manages and processes employee events related to automated qualification and administration of COBRA.

- COBRA Activity
- Data Entry
- Insert Cobra Activity**

Enter the enrollee's EmplID, regardless if you are processing the COBRA enrollment for the enrollee or a dependent and click **Search**

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

Find an Existing Value

EmpID: begins with ▼ 123456789

Empl Rcd Nbr: = ▼

Last Name: begins with ▼

First Name: begins with ▼

Department: begins with ▼

Case Sensitive

Search Clear Basic Search Save Search Criteria

Enter the date of the COBRA qualifying event in the **Event Date field**. The event date should match the coverage termination date from the enrollee's NYBEAS Update History "Events" panel

Insert Cbr Activity

Employee Details
JONES, MIKE EmplID: 123456789 Empl Rcd #: 0

Cobra Activity Information Find | View All First 1 of 1 Last

*Event Date: *COBRA Action: 🔍

Save Return to Search

The COBRA Action Code is the reason for loss of eligibility

Insert Cbr Activity

Employee Details

JONES, MIKE EmplID: 123456789 Empl Rcd #: 0

Cobra Activity Information Find | View All First 1 of 1 Last

*Event Date: *COBRA Action:

[Save](#) [Return to Search](#)

Look Up COBRA Action

COBRA Event Classification:

[Look Up](#) [Clear](#) [Cancel](#) [Basic Lookup](#)

Search Results

View All First 1-12 of 12 Last

COBRA Event Classification	Short Description
AGE	Overage
DEA	Death
DEP	Mar Depend
DIS	EEDisable
DIV	Divorce
DPC	DomPartCov
EXT	Ext Stu Co
LSP	Separation
MED	Medicare
RET	Retired
STM	ARRA
TER	Terminatio

Example

This enrollee's dependent has been deleted effective 3/31/21. Since, the COBRA qualifying event in this case is divorce, the acronym "DIV" will be used in the COBRA Action field

The screenshot displays the following information:

- Employee Information:** JONES, MIKE, EmplID: 123456789, Empl Rcd #: 0
- Plan Type:** Medical 10
- Event Information Table:**

Action Date	Effective Date	Eff Seq	Action	Reason	CBR Evtld	Ovrd Sw	Source ID	Request Date	Event Date	User ID	Dep Info	Comment	View Audit Info
04/26/2021	03/31/2021	0	DEP	Dependent Divorced	0	N			03/31/2020	DAH15			
09/11/2011	09/29/2011	0	RTQ	Rate Qualifier Change	0	N	COMPINFC		09/29/2011	MMF			
08/03/2009	07/17/2009	0	CCO	Chg Fam - Newborn Acquired	0	N		07/17/2009	07/17/2009	MED2			
02/18/2009	03/05/2009	0	BNS	Ben Status Change	0	N	JOBUI						

COBRA Qualifying Event

Return to Search | Previous tab | Next tab | Refresh

Events | Benefits | Medicare Part D | Hold Harmless | Programs | Billings | Benefits/Billings | Accounting | Accounting Summary | Card #'s | Jc

Enter the COBRA Qualifying Event Date and the COBRA Action Code and click **Save**. The steps for Day 1 are complete once saved. You must allow the system to update overnight before completing the steps for Day 2

The screenshot shows a web application interface for inserting COBRA activity. The title bar reads "Insert Cbr Activity". Below it, the "Employee Details" section shows the name "JONES, MIKE", "EmplID: 123456789", and "Empl Rcd #: 0". The "Cobra Activity Information" section contains a table with one row. The first column is labeled "*Event Date:" and contains the value "03/31/21". The second column is labeled "*COBRA Action:" and contains the value "DIV" with a search icon. The third column contains the text "Divorce". At the bottom left, a red arrow points to the "Save" button, which is highlighted with a red box. To its right is a "Return to Search" button.

Cobra Activity Information		
*Event Date:	03/31/21	*COBRA Action: DIV Divorce

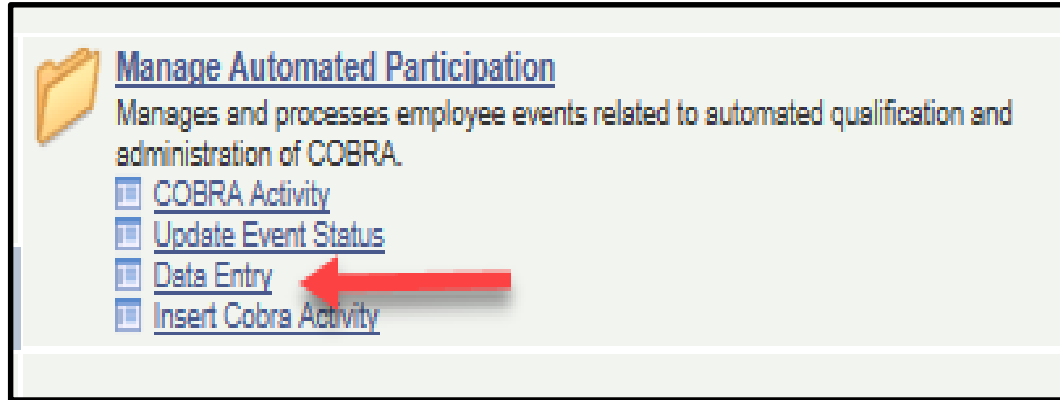
Day 2 Data Entry

- To complete the COBRA enrollment, you must process a **Data Entry** transaction. Once you complete the transaction, allow NYBEAS to update overnight and the enrollment will be reflected in NYBEAS the next day
- NYBEAS only allows processing for COBRA enrollments during a certain window of time from when the COBRA qualifying event occurred. Therefore, you must process COBRA enrollments as soon as possible. Otherwise, you will need to ask for EBD's assistance if you experience a NYBEAS error

Select **COBRA** from the NYBEAS Homepage



Find the **Managed Automated Participation** folder. Select **Data Entry**



In the first **COBRA Election** field, select the option **Elect** to enroll in COBRA


Participant Data	
<u>JONES, MIKE</u>	EmpID: Ben Rcd#: 0
COBRA Event ID: 1	Event Class: Termination
Dep/Benef: 00 JONES, MIKE	COBRA Emplid: 123456789
COBRA Election: <input type="text" value="Elect"/>	Election Date: <input type="text" value="04/30/2021"/>
	Waive:
	Revoke:

In the **Election Date** field, enter the date the application was signed. The application must be signed prior to the **Election End Date**





Participant Data			
<u>JONES, MIKE</u>	EmplID: Ben Rcd#: 0		
COBRA Event ID: 1	Event Class: Termination		
Dep/Benef: 00 JONES, MIKE	COBRA Emplid: 123456789		
COBRA Election: <input type="text" value="Elect"/>	Election Date: <input type="text" value="04/30/2021"/>		
	Waive:		
	Revoke:		
Participant Enrollment			
Plan Type: 10	Covrg Begin: 05/01/2021	Covrg End: 04/30/2024	Election End: 06/29/2021

In the second **COBRA Election** field select the option **Elect**

Participant Enrollment [Find](#) | [View All](#) First 1 of 1 La

Plan Type:	10	Covrg Begin:	05/01/2021	Covrg End:	04/30/2024	Election End:	06/29/2021
COBRA Election:	<input type="text" value="Elect"/>	Election Date:	<input type="text" value="04/30/2021"/>	Waive:		Revoke:	
Option Code:	<input type="text"/> 	Benefit Plan:	001	Coverage Code:	Family		
Provider ID:	<input type="text"/>		<input type="checkbox"/> Previously Seen				

Click on the magnify glass to choose
the correct **Option Code**

Participant Enrollment				Find View All	First  1 of 1  Last		
Plan Type:	10	Covrg Begin:	05/01/2021	Covrg End:	04/30/2024	Election End:	06/29/2021
COBRA Election:	<input type="text" value="Elect"/> 	Election Date:	<input type="text" value="04/30/2021"/>	Waive:		Revoke:	
Option Code:	<input type="text"/> 	Benefit Plan:		Coverage Code:			
Provider ID:	<input type="text"/>			<input type="checkbox"/>	Previously Seen		

Click on the magnify glass to choose
the correct **Option Code**

Look Up Option Code

Cancel

Search Results




View All

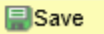
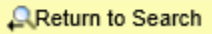
First ◀ 1-2 of 2 ▶ Last

<u>Option Code</u>	<u>Benefit Plan</u>	<u>Coverage Code</u>
11	001	1
12	001	4

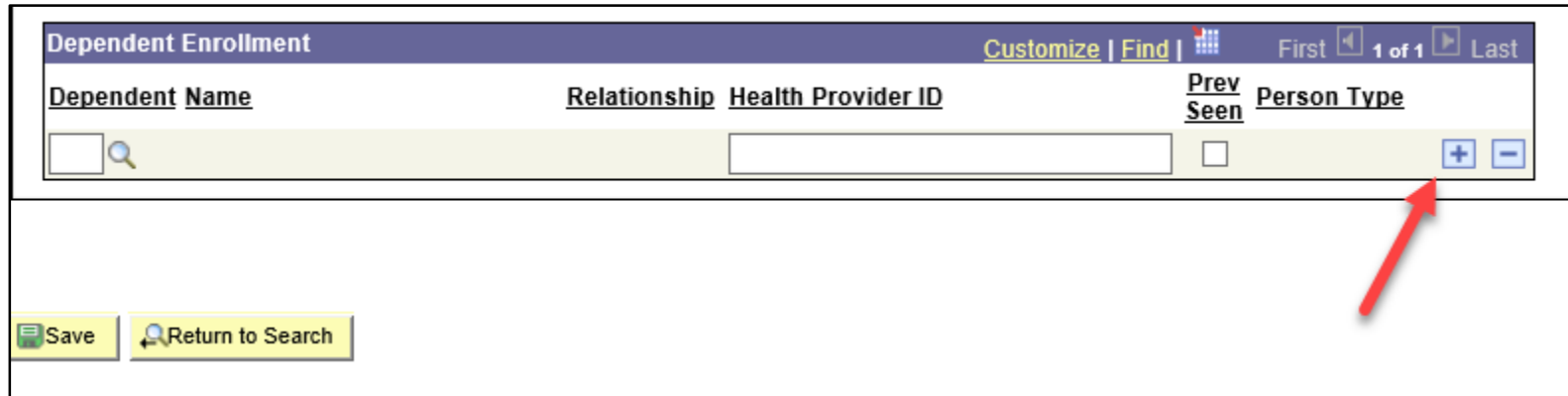
11 = Individual
12 = Family

If the enrollee has elected Family coverage, click the magnifying glass icon next to the box under Dependent Name. A list of all covered dependents at the time of the loss of eligibility will appear

Dependent Enrollment					Customize	Find	First	1 of 1	Last
Dependent Name	Relationship	Health Provider ID	Prev Seen	Person Type					
<input type="text"/> 		<input type="text"/>	<input type="checkbox"/>						

To add multiple dependents, click the **plus sign** on the right side of the screen under **Dependent Enrollment**. If you click on an incorrect dependent, simply click the minus sign to remove them prior to saving



The screenshot displays the 'Dependent Enrollment' interface. At the top, there is a header bar with the title 'Dependent Enrollment' and navigation options: 'Customize | Find |' followed by 'First 1 of 1 Last'. Below the header is a table with the following columns: 'Dependent Name', 'Relationship', 'Health Provider ID', 'Prev Seen', and 'Person Type'. The 'Dependent Name' column contains a search input field with a magnifying glass icon. The 'Prev Seen' column contains a checkbox. The 'Person Type' column contains a plus sign button and a minus sign button. A red arrow points to the plus sign button. At the bottom left, there are two buttons: 'Save' and 'Return to Search'.

Once you have finished entering the enrollment information. Click the “Save” button at the bottom of the screen. Steps for Day 2 are now complete.

The screenshot displays a web application interface for "Dependent Enrollment". At the top, there is a header bar with the title "Dependent Enrollment" and navigation options: "Customize | Find |" followed by a grid icon, and "First 1 of 1 Last". Below the header is a table with the following columns: "Dependent Name", "Relationship", "Health Provider ID", "Prev Seen", and "Person Type". The "Dependent Name" column contains a search input field with a magnifying glass icon. The "Relationship" and "Health Provider ID" columns contain empty text input fields. The "Prev Seen" column contains a checkbox. The "Person Type" column contains a plus sign and a minus sign button. At the bottom of the interface, there are two buttons: "Save" and "Return to Search". A red arrow points to the "Save" button.

Day 3 Check the Enrollment Record

- The COBRA enrollment will show in NYBEAS on the following business day
- If the enrollment is for a former employee, the COBRA will show up under the enrollee's social security number and they will continue to use the insurance cards they were issued when they were still employed
- Once you have completed the transaction, be sure to check the NYBEAS Update History to make sure that the transaction was successful

Day 3 Check the Enrollment Record – Enrollee

Events **Benefits** Medicare Part D Hold Harmless Programs Billings

Employee Information
JONES, MIKE EmplID: 123456789 Empl Rcd #: 0

Plan Type View All First 1 of 1 Last

Plan Type: Medical 10

Event Information View All | First 1-4 of 5 Last

Action Date	Effective Date	Eff Seq	Action	Reason	CBR Evtld	Ovrd Sw	Source ID	Request Date	Event Date	User ID	Dep Info	Comment	View Audit Info
04/30/2021	05/01/2021	0	ENR	COBRA Enrollment	1	N	CBRBATCH			PCONTROL			
04/08/2021	05/01/2021	0	CAN	Termination	0	N	JOBUPDTE						
01/06/2010	12/06/2009	0	DEP	Add Dependent	0	N			12/06/2009				
12/19/2002	10/11/2002	0	DEP	Add Dependent	0	N			10/11/2002				

Return to Search Previous tab Next tab Refresh

Events | Benefits | Medicare Part D | Hold Harmless | Programs | Billings | Benefits/Billings | Accounting | Accounting Summary | Card #'s | Job Department of Service

Day 3 Check the Enrollment Record – Dependent

- If the enrollment is for a dependent, the COBRA enrollee will be assigned a new ID number beginning with the letter “C” which they can use to reference their COBRA coverage. They will also receive new insurance cards
- You can locate their new NYBEAS file and C number by searching for their name in NYBEAS Update History or by using other Search functions you have learned today

Day 3 Check the Enrollment Record – Dependent

Events **Benefits** Medicare Part D Hold Harmless Programs Billings

Employee Information

JONES, DEPENDENT EmplID: C000123456 Empl Rcd #: 0

Plan Type View All First 1 of 1 Last

Plan Type: Medical 10

Event Information View All First 1 of 1 Last

Action Date	Effective Date	Eff Seq	Action	Reason	CBR Evtld id	Former id	Ovrd Sw	Source ID	User ID	Dep Info	Comment	View Audit Info
09/26/2019	10/01/2019	0	ENR	COBRA Enrollment	1	123456789	N	CBRBATCH	PCONTROL			

Return to Search Previous tab Next tab Refresh

Events | [Benefits](#) | [Medicare Part D](#) | [Hold Harmless](#) | [Programs](#) | [Billings](#) | [Benefits/Billings](#) | [Accounting](#) | [Accounting Summary](#) | [Ca](#)

HBA Online E-Learning



HBA Online E-Learning

The screenshot shows the HBA Online E-Learning website. At the top left is the New York State logo. A navigation bar contains links for Services, News, Government, and Local. Below this is a teal bar with links for Department of Civil Service, Online Services, Job Seekers, State Employees, Retirees, and HR Professionals. The main content area features the 'hba_online benefits resource center' logo. On the left is a vertical menu with items like 'You Should Know...', 'Easy Reference', 'Publications & Forms', 'HBA Memos', 'Policy Memos', 'Phone Numbers / Links', 'Meetings & More', 'Health Plan Choices' (highlighted in red), 'HBA Manuals', 'E-Learning', 'HIPAA Privacy Information', 'Site Map', 'Contact Us / Disclaimer', and 'NYSHIP Home'. In the center, there is a search bar with the text 'Find the benefit, click on the group. Benefits vary by group.' Below the search bar are several categorized boxes: 'Current Topics' (red) with sub-items 'PA/PE Webinars' and 'Young Adult Option Coverage'; 'General Information Book for:' (dark blue) with sub-items 'NY Active', 'NY Retiree', 'Participating Employers (PEs)', 'Participating Agencies (PAs)', and 'Student Employee Health Plan (SEHP)'; 'Pre-retirement Planning' (dark blue); 'dental' (dark blue) with sub-items 'APSU', 'C-82', 'M/C', 'NYSCOPBA', 'PBA Supervisors', 'PBA Troopers', 'PE', 'PEF', 'PIA', and 'SEHP'; 'life' (dark blue) with sub-item 'M/C'; 'IPP Income Protection Plan' (dark blue) with sub-items 'M/C' and 'DC-37'; 'survivor benefits' (dark blue) with sub-item 'New York State Active Employees'; and 'workers' compensation' (dark blue) with sub-item 'ARS Publications for Executive Branch Agencies and Unified Court'.

<https://www.cs.ny.gov/employee-benefits/hba/>

HBA Online E-Learning

hba_online
benefits resource center

You Should Know...
Easy Reference
Publications & Forms
HBA Memos
Policy Memos
Phone Numbers / Links
Meetings & More
Health Plan Choices
HBA Manuals
E-Learning
HIPAA Privacy Information
Site Map
Contact Us / Disclaimer
NYSHIP Home

Find the **benefit**, click on the group. *Benefits vary by group.*

Current Topics
PA/PE Webinars
Young Adult Option Coverage

General Information Book for:
NY Active
NY Retiree
Participating Employers (PEs)
Participating Agencies (PAs)

Pre-retirement Planning
New York State and PE

denta
APSU
C-82
M/C
NYSCO
PBA S
PBA T
PE
PEF
PIA
SEHP

HBA Online E-Learning

E-Learning

This page is a resource for Health Benefits Administrators (HBA). Below are links to a series of tutorials to benefits. If you have questions or need additional help, please call the HBA Helpline at 518-474-2780.

Ordering NYSHIP Publications:



VIDEO

[Active Employees of New York State Agencies \(NY\)](#)



VIDEO

[Active Employees of Participating Employers \(PE\)](#)



VIDEO

[Retirees of New York State Agencies and Participating Employers \(Retirees NY & PE\)](#)



VIDEO

[Active Employees and Retirees of Participating Agencies \(PA\)](#)

NYBEAS Transactions:



VIDEO

[Adding a New Hire into NYBEAS](#)

- [New York State Agencies \(NY\)](#)
- [Participating Employers \(PE\)](#)
- [Participating Agencies \(PA\)](#)



VIDEO

[Change in Coverage – Individual to Family](#)

- [New York State Agencies \(NY\)](#)
- [Participating Employers \(PE\)](#)
- [Participating Agencies \(PA\)](#)



VIDEO

[Change in Coverage – Family to Individual](#)

- [New York State Agencies \(NY\)](#)



NYBEAS Training Videos on HBA Online

- [Adding a New Hire into NYBEAS](#)
- [Change in Coverage – Individual to Family](#)
- [Change in Coverage – Family to Individual](#)
- [Enrollee Termination - COBRA Family Enrollment](#)
- [Deleted Dependent - COBRA Enrollment](#)
- [Dependent Delete](#)
- [Enrollee Address Change](#)
- [Enrollee Termination](#)
- [Enrolling an Employee into a Benefit Plan](#)
- [Waiving Benefits for an Employee](#)

Questions

