



**Department of
Civil Service**

NYSHIP for Participating Employer Retirees

Employee Benefits Division

June 25, 2021

Agenda

1. Background
2. Requirements to Continue NYSHIP Coverage in Retirement
3. Determine if the Employee Meet the Requirements to continue NYSHIP
4. Update NYBEAS with Employee Change Requests
5. Process Retirement or Termination in NYBEAS Workforce Administration
6. Enter Sick Leave Credit Information
7. Deferment and Sick Leave Credit Preservation
8. Determine Medicare eligibility
9. Checklist

Background

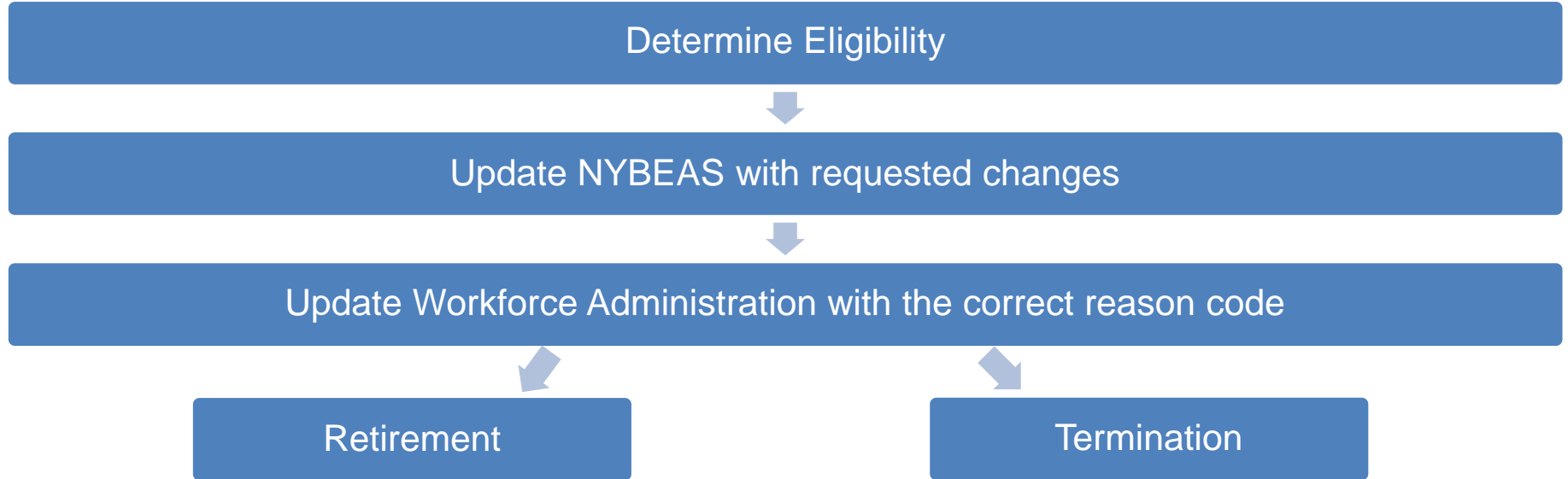
Background

- Employees who separate or retire from a Participating Employer (PE) must meet eligibility requirements to be qualified for New York State Health Insurance Program's (NYSHIP) retiree coverage

Background

- As a Health Benefits Administrator (HBA), it is your responsibility for:
 - Determining whether your employees meet the eligibility requirements to continue NYSHIP coverage in retirement
 - Updating NYBEAS with any changes requested by employees
 - Updating NYBEAS with the appropriate retirement or termination transactions

Background



Requirements to Continue NYSHIP Coverage in Retirement

Requirements to Continue NYSHIP Coverage in Retirement

An employee from a PE must meet all of the following three eligibility requirements to continue NYSHIP coverage in retirement

1. Complete the minimum service period in a benefits-eligible position
2. Satisfy the requirements for retiring as a member of a retirement system
3. Be enrolled in NYSHIP

Minimum Service Period Requirement

- The employee's service time must meet the employer's established service requirement (five years or more) in a NYSHIP benefits-eligible position
- Service time does not need to be consecutive
- If the employee has less service time than the requirement established by your agency, your agency may recognize previous service an employee has with another NYSHIP-participating PE or PA, and/or the State

Membership in a Retirement System

- The employee must be eligible to retire or have retired as a member of a retirement system administered by New York State or by one of its political subdivisions

Membership in a Retirement System

- If the employee is not a member of a retirement system administered by the State or one of its political subdivisions, the employee must satisfy at least one of the following conditions in order to continue coverage in retirement:
 - The employee must meet the age requirement of the New York State and Local Retirement System (NYSLRS) retirement tier in effect at the time the employee last entered service
 - The employee must be qualified to receive Social Security disability payments

Enrollment in NYSHIP

- Employees must be enrolled in NYSHIP as an enrollee or as a dependent at the time of retirement. Enrollment in NYSHIP may be through:
 - The Empire Plan
 - A NYSHIP HMO
 - An alternative health insurance plan offered by your agency
 - A buyout program through your agency

Eligible Employees

- If the employee meets all three of the eligibility requirements:
 - The employee will qualify to continue NYSHIP coverage in retirement
 - The employee may defer the start of their NYSHIP retiree coverage
 - If eligible, the employee may convert unused sick leave hours into a monetary amount known as a Sick Leave Credit to offset the monthly retiree health insurance premium

Determine if the Employee Meets the Requirements to Continue NYSHIP Coverage in Retirement

NYBEAS Benefits Tab

- Review the Benefits Tab in NYBEAS to confirm the employee is enrolled in NYSHIP
- If you do not see enrollment in a NYSHIP plan, determine if the enrollee is enrolled:
 - As a dependent on another NYSHIP plan
 - In an alternative health insurance plan offered by the PE
 - In a buyout program through your agency

NYBEAS Job Tab

- Review the Job Tab to determine that the employee has met the service requirement of your agency
- If the employee retires while on a Leave status, you may process a retirement transaction on top of the Leave Without Pay (LWOP)

NYBEAS Personal Tab

- Check the employee's age to determine if they satisfy the requirement for retirement as a member of a retirement system
 - If the employee is under age 55, verify whether the employee has provided a copy of a Disability Retirement Letter from the Retirement System with the effective date of retirement
- Review the Retirement System information
 - If the information needs to be updated, use the Personal/Employment transaction to update NYBEAS with the appropriate Retirement System (ERS, TRS, TIAA-CREF) and the Retirement Registration #

NYBEAS Personal Tab

- Verify that all personal and contact information is up to date
 - Check for any recent correspondence that may provide you with updated contact information
 - If employee is enrolled in an HMO, verify their home address is within the HMO service area

NYBEAS Dependents Tab

- If the employee has covered dependents verify that you have complete personal information for all covered dependents
 - Full First and Last Name
 - Date of Birth
 - Social Security Number

Update NYBEAS with Employee Change Requests

Employee Change Requests Examples

Information Changes

- Address changes
- Name changes
- Medicare information updates

Plan Changes

- Coverage changes
- Adding dependents
- Removing dependents
- Option changes

Employee Change Requests

- Gather any documentation submitted by the employee
- Update NYBEAS with any information changes for the enrollee or dependent(s)
- If the enrollee requests any plan changes, process the change(s) in NYBEAS, **only** if the employee is eligible to make the change and the effective date will be prior to or the same day as the enrollee's retirement or termination date

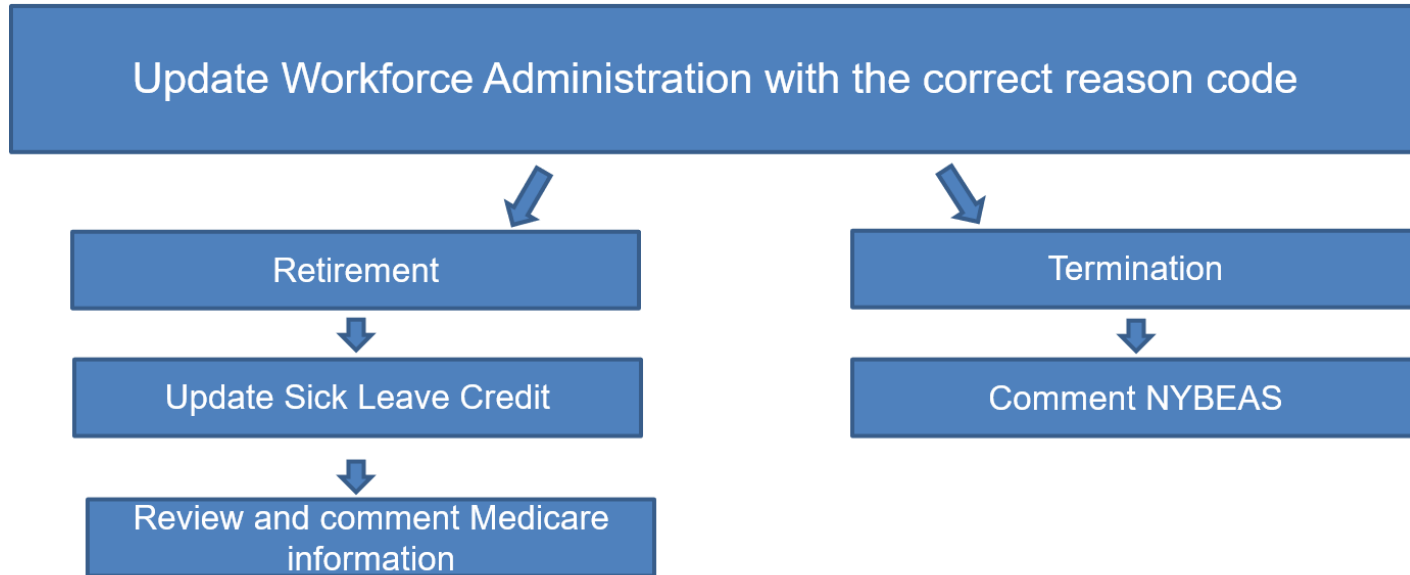
Employee Change Requests

- Plan changes processed with an effective date later than the retirement or termination date will block the retirement or termination transaction in NYBEAS
- Requests for plan changes later than the retirement or termination date should be sent to EBD for review
- Requests to defer NYSHIP coverage should be sent to EBD for review

Process Retirement or Termination Transaction in NYBEAS Workforce Administration

Workforce Administration

The first step is to update Workforce Administration in NYBEAS with the appropriate action and reason codes



Workforce Administration

After Processing a Retirement

Eligible employees will automatically be qualified by EBD staff for NYSHIP coverage in retirement

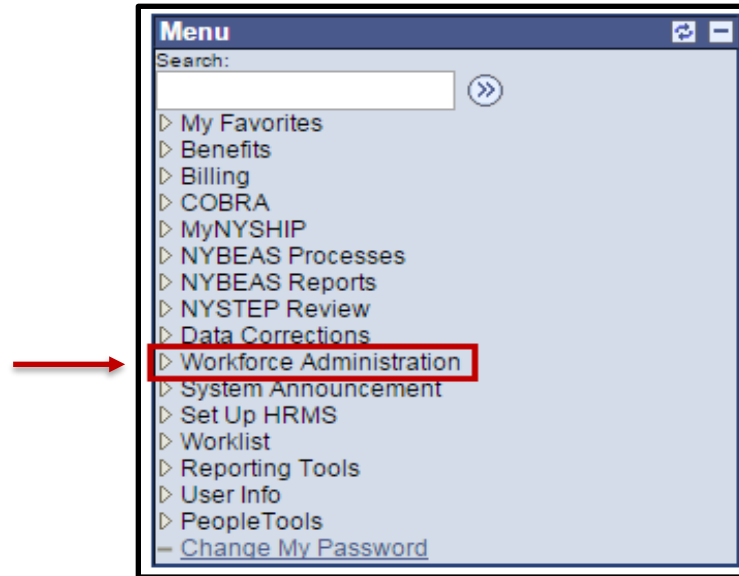
Workforce Administration

After Processing a Termination

The HBA must add a NYBEAS comment to advise EBD what the terminated enrollee is eligible for (COBRA, Vestee, or both). EBD will send a Vestee or COBRA application to the employee once EBD is able to verify the comment in NYBEAS

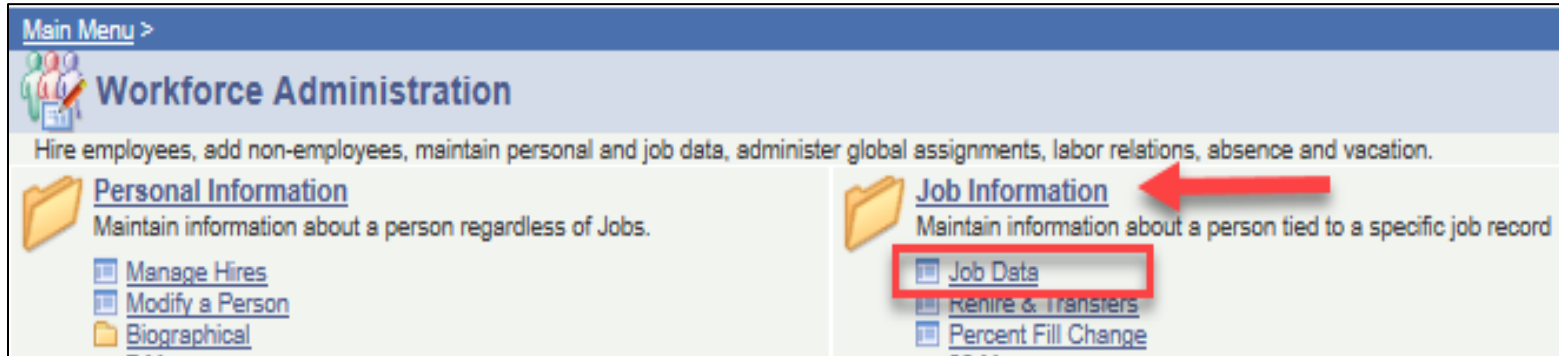
Workforce Administration

From the NYBEAS homepage, select Workforce Administration



Workforce Administration

Under the Job Information menu, choose Job Data



The screenshot shows a web application interface for Workforce Administration. At the top, there is a blue header with the text "Main Menu >". Below this, the "Workforce Administration" section is displayed, featuring an icon of three people and a pencil. The description reads: "Hire employees, add non-employees, maintain personal and job data, administer global assignments, labor relations, absence and vacation." Two main menu items are shown as folders: "Personal Information" and "Job Information". Under "Personal Information", there are links for "Manage Hires", "Modify a Person", and "Biographical". Under "Job Information", there are links for "Job Data", "Renire & Transfers", and "Percent Fill Change". A red arrow points to the "Job Information" folder, 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](#)

Workforce Administration

Click on the Plus sign to add a new row to the Job Data page

Job Data
Employment

Employee Info
EmplID: 123456789 Empl Rcd #: 0

ENROLLEE, SAM

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

Employee Status:	Active		+ -
*Effective Date/Seq:	09/01/2004 <input type="text"/> <input type="button" value="BY"/> <input type="text" value="0"/> Current		
*Action / Reason:	<input type="button" value="HIR"/> <input type="button" value="HIR"/> Hire		Action Date: 09/03/2004
Department:	<input type="text" value="03287"/> Town Of Brookhaven		
Company:	PA Participating Agency	*Pay Group: <input type="text" value="MTH"/>	Monthly - PA
Negotiating Unit:	<input type="text" value="PA"/> Participating Agency		
Employee % Filled:	<input type="text" value="100"/>	Source ID: CORRECT	Operator ID: LXR3
Title Code:	<input type="text" value="9999999"/> Title Not Defined		
Hire Date	09/01/2004	Termination Date	
Rehire Date	09/01/2004		

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

Effective Date:	09/01/2004	+ -
Benefit Program:	PA7 PA Option 7 (Actives)	

Workforce Administration

Enter the date of the retirement or termination as the effective date and then click the magnifying glass to pull up action and reason code listings

The screenshot displays the 'Job Data' tab for an employee named Sally Sample. The interface includes a search bar at the top right with options for 'Find', 'View All', 'First', '1 of 5', and 'Last'. The main data area is organized into several sections:

- Employee Info:** SAMPLE, SALLY; EmplID: 999999998; Empl Rcd #: 0
- Job Data:** Employee Status: Active; *Effective Date/Seq: 09/05/2019; Action / Reason: (empty search boxes); Action Date: 09/05/2019
- Department:** 08000 NYS Dept Of Civil Service
- Company:** NYS New York State; *Pay Group: ALB Administrative/Lag/Biweekly
- Negotiating Unit:** 05 Professional Scientific/Tech
- Employee % Filled:** 100; **Source ID:** (empty); **Operator ID:** MKJ2
- Title Code:** 0421300 Senr Auditor
- Hire Date:** 01/27/1994; **Termination Date:** (empty)
- Rehire Date:** 01/27/1994

Red arrows in the image highlight the 'Effective Date/Seq' field, the search boxes for 'Action / Reason', and the 'Action Date' field.


Workforce Administration

If the employee is eligible for NYSHIP coverage in retirement, select the **Action Code RET - Retirement**

Action	Action Description
AGY	Agency Split
DCS	Department Civil Service
ERV	Emergency Volunteer/Enroll.
IAG	Within Agency Transfer
LOA	Leave of Absence
LTQ	Long Term Disability
PLA	Paid Leave of Absence
PLC	PLACE
POS	Position Change
RET	Retirement
RFL	Return from Leave
RTQ	Rate Qualifier Change
RWB	Return from Work Break
SEP	Separation
STQ	Short Term Disability
SUR	Survivor Enrollment
SWB	Short Work Break
TER	Termination
YAD	Young Adult Enrollment
ZZZ	Conversion

Workforce Administration

Then select the Reason Code RET - Regular Retirement

<u>Reason Code</u>	<u>Description</u>
<u>NPR</u>	<u>No-Penalty Retirement Incentive</u>
<u>RET</u>	<u>Regular Retirement</u> 
<u>RMT</u>	<u>Normal Retirement</u>
<u>TRI</u>	<u>Targeted Retirement Incentive</u>


Workforce Administration

If the employee is not eligible for NYSHIP coverage in retirement, select the **Action Code TER - Termination**

Action	Action Description
AGY	Agency Split
DCS	Department Civil Service
ERV	Emergency Volunteer/Enroll
IAG	Within Agency Transfer
LOA	Leave of Absence
LTO	Long Term Disability
PLA	Paid Leave of Absence
PLC	PLACE
POS	Position Change
RET	Retirement
RFL	Return from Leave
RTQ	Rate Qualifier Change
RWB	Return from Work Break
SEP	Separation
STO	Short Term Disability
SUR	Survivor Enrollment
SWB	Short Work Break
TER	Termination ←
YAD	Young Adult Enrollment
ZZZ	Conversion

Workforce Administration

Then select the Reason Code TER - Terminate

<u>Reason Code</u>	<u>Description</u>
<u>DEA</u>	<u>Death</u>
<u>LAF</u>	<u>Layoff frm State/Refuse Reassn</u>
<u>TER</u>	<u>Terminate</u> 
<u>UAB</u>	<u>Terminate-Unauthorized Absence</u>

Workforce Administration

Review your work and then click Save

Job Data **Employment**

Employee Info

SAMPLE, SALLY EmplID: 999999998 Empl Rcd #: 0

Job Data Find | View All First 1 of 5 Last

Employee Status: Retired

*Effective Date/Seq: 09/12/2019 0 Current

*Action / Reason: RET RET Regular Retirement Action Date: 09/12/2019

Department: 08000 NYS Dept Of Civil Service

Company: NYS New York State *Pay Group: ALB Administrative/Lag/Biweekly

Negotiating Unit: 05 Professional Scientific/Tech

Employee % Filled: 100 Source ID: Operator ID: MKJ2

Title Code: 0421300 Senr Auditor

Hire Date 01/27/1994 Termination Date 09/11/2019

Rehire Date 01/27/1994 Last Date Worked 09/11/2019

Benefit Program Find | View All First 1 of 1 Last

Effective Date: 01/27/1994

Benefit Program: A02 PEF w/ Rx (Dental/Vision) BW

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

NYBEAS Comments

- When a termination transaction (TER/TER) is processed you must leave a comment in NYBEAS to advise EBD if the enrollee is eligible for Vestee coverage or only eligible for COBRA coverage
- If the enrollee is eligible for Vestee coverage, you must enter the date they will become eligible as a retiree in your NYBEAS comment
- Once EBD is able to verify a comment in NYBEAS, EBD will send the enrollee an application to enroll in Vestee coverage or COBRA coverage, as appropriate

NYBEAS Comments

If the enrollee is eligible for Vestee coverage, create a comment informing EBD of Vestee eligibility and the date they will become eligible as a retiree

Benefit Comments

SAMPLE, SALLY EmpID: 999999999 Empl Rcd #: 0

Employee Status: Active

Dependent/Beneficiaries [Find](#) | [View All](#) [First](#) ◀ 2 of 8 ▶ [Last](#)

Dependent/Beneficiary ID:

*Comment Date: Action Date:

Comments By:

Comment:

EE TERMED EFFECTIVE 10/15/19 AND IS NOT ELIGIBLE FOR RETIREE BENEFITS YET, EE IS ELIGIBLE TO BE A VESTEE, AND WOULD BECOME A RETIREE EFFECTIVE 12/1/2020

NYBEAS Comments

If the enrollee is only eligible for COBRA coverage, create a comment informing EBD of COBRA eligibility

Benefit Comments

SAMPLE, SALLY EmpID: 999999999 Empl Rcd #: 0

Employee Status: Active

Dependent/Beneficiaries Find | View All First ◀ 2 of 8 ▶ Last

Dependent/Beneficiary ID: 01 🔍 + -

*Comment Date: 9/13/2019 📅 Action Date: 9/13/2019 📅

Comments By: KEY YOUR FULL NAME

Comment:

EE TERMED EFFECTIVE 10/15/19 AND IS NOT ELIGIBLE FOR RETIREE BENEFITS. EE IS ONLY ELIGIBLE FOR COBRA, PLEASE SEND COBRA APP.

Save 🔍 Return to Search

Enter Sick Leave Credit Information

Sick Leave Credit

- If your agency accepts Sick Leave Credit and the employee is eligible, you must enter Sick Leave Credit information into NYBEAS after a retirement transaction has been processed
- NYBEAS must be updated timely to avoid billing discrepancies
- Confirm whether the employee has chosen Single Annuitant or Dual Annuitant Sick Leave Credit
 - [NYSHIP Sick Leave Credit Option Election Form \(PS-405\)](#)
 - The employee must sign the election form prior to their retirement date

Sick Leave Credit

After you have processed a Retirement transaction:

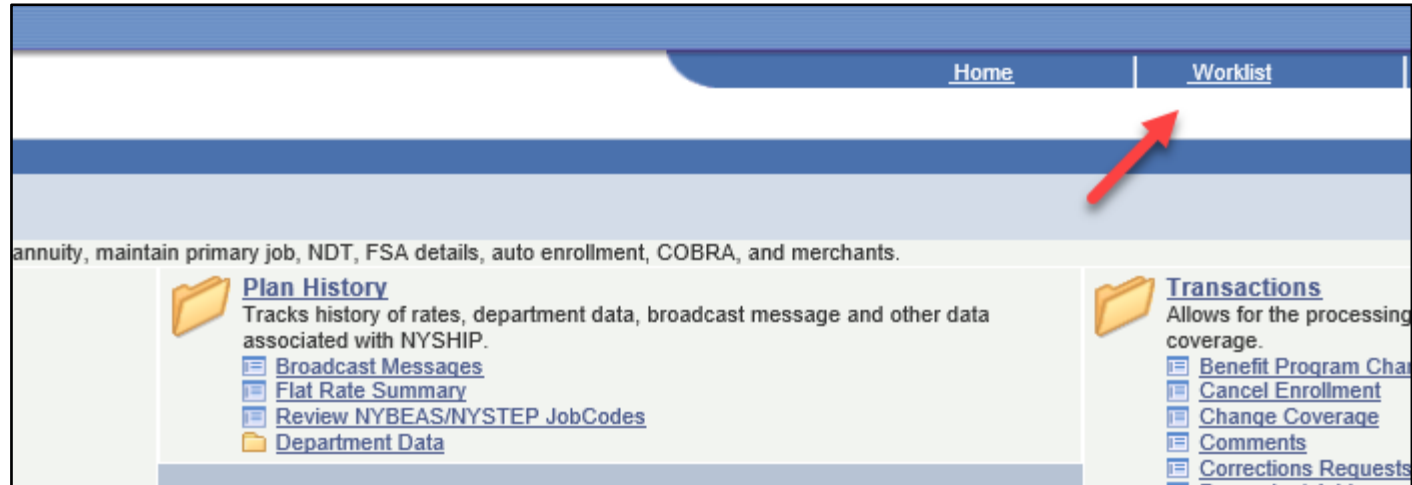
- You should find the employee on the HBA Sick Leave Worklist which will bring you to the Sick Leave Adjustment transaction in NYBEAS

OR

- You can add the enrollee's Sick Leave Credit Information directly from the Sick Leave Adjustment transaction in NYBEAS

Sick Leave Credit

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



Sick Leave Credit

All worklists that you have access to will appear. Click the HBA Sick Leave Worklist

Worklist Summary						
Customize Find View All First 1-6 of 6 Last						
	Detail	Filter	Business Process	Activity	Worklist	Count
1	Detail	Filter	NYBEAS Administer Workforce	NYBEAS Hire Notifications	New Enrollment <HBA>	959
2	Detail	Filter	NYBEAS Administer Workforce	NYBEAS Job Notifications	Return From Leave <HBA>	1
3	Detail	Filter	NYBEAS Administer Workforce	NYBEAS Job Notifications	Retiree Rehires <HBA>	24
4	Detail	Filter	NYBEAS Administer Workforce	NYBEAS Job Notifications	HBA Sick Leave <HBA>	17
5	Detail	Filter	NYBEAS Administer Workforce	NYBEAS_WORKERS_COMP_DEFERRED	HBA Workers Compensation WL	85
6	Detail	Filter	MyNYSHIP Transactions	MyNYSHIP Enrollment	HBA Enrollment	7

Field 1: Field 2: Field 3: [Sort](#) [Save Comments](#)

Sick Leave Credit

Click Work It next to an enrollee's ID and NYBEAS will bring you to the Sick Leave Adjustment transaction for that enrollee

Worklist Summary						Customize Find View All	First	1-6 of 6	Last
Detail	Filter	Business Process	Activity	Worklist	Count				
1	Detail	Filter	NYBEAS Administer Workforce	NYBEAS Hire Notifications	New Enrollment <HBA>	959			
2	Detail	Filter	NYBEAS Administer Workforce	NYBEAS Job Notifications	Return From Leave <HBA>	1			
3	Detail	Filter	NYBEAS Administer Workforce	NYBEAS Job Notifications	Retiree Rehires <HBA>	24			
4	Detail	Filter	NYBEAS Administer Workforce	NYBEAS Job Notifications	HBA Sick Leave <HBA>	17			
5	Detail	Filter	NYBEAS Administer Workforce	NYBEAS_WORKERS_COMP_DEFERRED	HBA Workers Compensation WL	85			
6	Detail	Filter	MyNYSHIP Transactions	MyNYSHIP Enrollment	HBA Enrollment	7			

Field 1: Field 2: Field 3: [Sort](#) [Save Comments](#)

Worklist Details									Customize Find View All	First	1-15 of 17	Last
Mark Worked	ID	Emp#	Rcd#	DeptID	Name	Employee Status	Percent Worked	Depend. ID	Sent From			
1	<input checked="" type="checkbox"/>	Work It	<input type="text"/>	<input type="text"/>	<input type="text"/>				PCONTROL			
2	<input checked="" type="checkbox"/>	Work It	<input type="text"/>	<input type="text"/>	<input type="text"/>				PCONTROL			
3	<input checked="" type="checkbox"/>	Work It	<input type="text"/>	<input type="text"/>	<input type="text"/>				PCONTROL			

Sick Leave Credit

To navigate directly to the Sick Leave Adjustment Transaction from the Main Menu in NYBEAS, select Sick Leave Adjustments under the Transactions Folder

The screenshot displays the 'Main Menu >' interface of NYBEAS. It is organized into three main sections: Benefits, Plan History, and Transactions. A red arrow points to the 'Sick Leave Adjustments' link within the Transactions folder.

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](#)
- [ERS Retirement Data](#)
- [Letter Notification](#)
- [Life Insurance Premium](#)
- [National Medical Support Order](#)
- [OOP Eligibility History](#)
- [Sick Leave History](#)
- [OSC Salary Grade Inquiry](#)
- [CMS/RDS Data](#)
- [DEAS](#)
- [PEP](#)
- [Search](#)
- [Workers' Comp Duration](#)
- [Weekly Rate Qualifier Errors](#)

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](#)
- [MRX Exception](#)
- [National Medical Support Order](#)
- [Personal / Employment](#)
- [Preferred Payment Change](#)
- [Sick Leave Adjustments](#)
- [Sick Leave Credit Preservation](#)
- [Tax Election Change](#)
- [OOP](#)
- [PEP](#)
- [Retro Sick Leave Adjustment](#)

Sick Leave Credit

Enter the Employee ID number and click “Search”

Sick Leave Adjustments

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

Find an Existing Value

EmplID:


Empl Rcd Nbr:

Last Name:

First Name:

Department:

Case Sensitive

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

Sick Leave Credit

Enter information on the Sick Leave Adjustment page

Sick Leave Adjustments

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

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

Enrollee's Current Coverage Info

Effdt - Event ID	Covrg Elect	Ben Plan	Covrg	Paymt	Tax	Tax	Rate
Company	Pay Group	Cust ID	Billing Status	Method	Elect	Flag	Share
07/01/2018	0 Elect	001	Family	DIRP	B	A	% Empl
G04 NMBR RET PE RX 100/100		Imputed Income N PEP Amt		0.00	Sick Leave	0.00	
PE	Monthly PE	98000	Pending	Med Primacy	<input type="checkbox"/>	Med Reimbursement	<input type="checkbox"/>

Select Action

*Action: *Reason: Event Dt: Request Dt: Effective Dt:

Sick Leave Update

Retirement Type: System: Date: Birthdate: 05/26/1963

*Sick Lv. Type: Hours:

Std Hrs/Wk: Annual Salary: Hourly Rate: Amt:

Plan Type **10** for Medical

Reason will always be **Fix**

Event Date is the **Benefit Program Change Date** (the date in the **blue-green** box)

Effective Date will auto-populate when you enter the **Event Date**

Sick Leave Credit

Enter the Retirement Type and Retirement System. The Date of Retirement will auto-populate

Retirement Type System Date 06/01/2018 Birthdate: 05/26/1963

*Sick Lv. Type Hours

Std Hrs/Wk Annual Salary Hourly Rate Amt: Preferred Payment

Retirement Type: select regular (**SERV**) or disability (**DISA**) retirement

Select one of the following values:

DISA	RETIRED DUE TO DISABILITY
SERV	REGULAR RETIREMENT TYPE

[Cancel](#)

Retirement System: select the member's retirement system:

Select one of the following values:

1	Employee's Retirement System
2	Teacher's Retirement System
3	Military and Naval
4	State Police Retirement System
6	Hospital Retirement System
7	Correction's Retirement System
8	New York City Retirement System
9	TIAA/CREF

[Cancel](#)

Date is the member's actual retirement date entered in the Job panel.

Sick Leave Credit

Enter Sick Leave Type, Standard Hours/Wk, Hours, and Annual Salary

Sick leave type

Select Single Annuitant or Dual Annuitant

BEA Sick Leave Type	Translate Long Name
SnglAnnuit	Single Annuitant Sick Leave
DualAnnuit	Dual Annuitant Sick Leave
None	None

Hours

Number of hours of unused sick time

Std Hrs/Wk

Select hours worked per day

Standard Hours	Description
7	Standard hours
7.5	Standard hours
8	Standard hours
10.6	Standard hours

The **Hourly Rate** will

populate when the Hours Per week and Annual Salary are entered.

Sick Leave Credit

Review the information you entered is correct. Then Click Save

Sick Leave Adjustments

Employee Information

ENROLLEE, MIKE EmplID: 123456789 Empl Rcd #: 0

Select Plan Type

*Plan Type: Medical COBRA Event Id: 0

Enrollee's Current Coverage Info

Effdt - Event ID	Covrg Elect	Ben Plan	Covrg	Paymt	Tax	Tax	Rate
Company	Pay Group	Cust ID	Billing Status	Method	Elect	Flag	Share
07/01/2018	0 Elect	001	Family	DIRP	B	A	% Empl
G04 NMBR RET PE RX 100/100				Imputed Income N PEP Amt	0.00	Sick Leave	0.00
PE	Monthly PE	98000	Pending	Med Primacy	<input type="checkbox"/>	Med Reimbursement	<input type="checkbox"/>

Select Action

*Action	*Reason	Event Dt	Request Dt	Effective Dt
<input type="text" value="SCK"/>	<input type="text" value="FIX"/>	<input type="text" value="07/01/2018"/>	<input type="text"/>	<input type="text" value="07/01/2018"/>

Sick Leave Update

Retirement Type System Date Birthdate: 05/26/1963

*Sick Lv. Type SnglAnnuit Hours

td Hrs/Wk Annual Salary Hourly Rate 31.68 Amt: 11.75

Preferred Payment

Deferment and Sick Leave Credit Preservation

Defer Coverage

If the employee is enrolled in NYSHIP as the policyholder and will be deferring coverage:

- Process the Retirement transaction and Sick Leave Adjustment the same as you would for a retirement
- Leave a comment in NYBEAS to inform EBD the employee will be deferring coverage
- Forward the employee's request to defer coverage and any required proofs to EBD

Defer Coverage

If an employee who is not enrolled in NYSHIP as a policyholder, but meets the eligibility requirement for enrollment in NYSHIP by being enrolled in NYSHIP as a dependent or through enrollment in an alternative health plan or buyout program through your agency and will be deferring coverage:

- Add Sick Leave Credit information to the Sick Leave Credit Preservation transaction so that the employee can use their sick leave credit if/when they enroll in NYSHIP coverage in the future
- Forward the employee's request to defer coverage and any required proofs to EBD

Defer Coverage

If an employee who is not enrolled in NYSHIP as a policyholder requests to defer, determine if they meet the eligibility requirement for enrollment in NYSHIP:

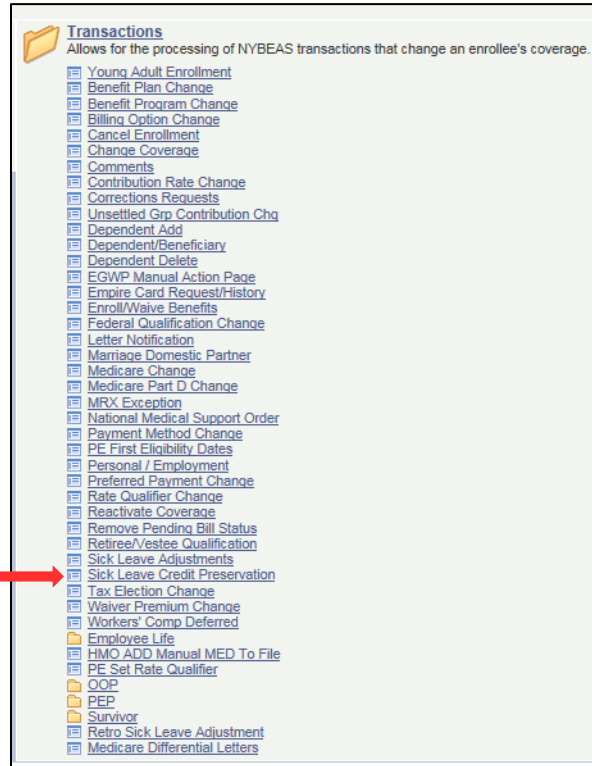
- By being enrolled in NYSHIP as a dependent; or
- Through enrollment in an alternative health plan or buyout program through your agency

If the employee meets the eligibility requirement for enrollment in NYSHIP:

- Add Sick Leave Credit information to the Sick Leave Credit Preservation transaction so that the employee can use their sick leave credit if/when they enroll in NYSHIP coverage in the future
- Forward the employee's request to defer coverage and any required proofs to EBD

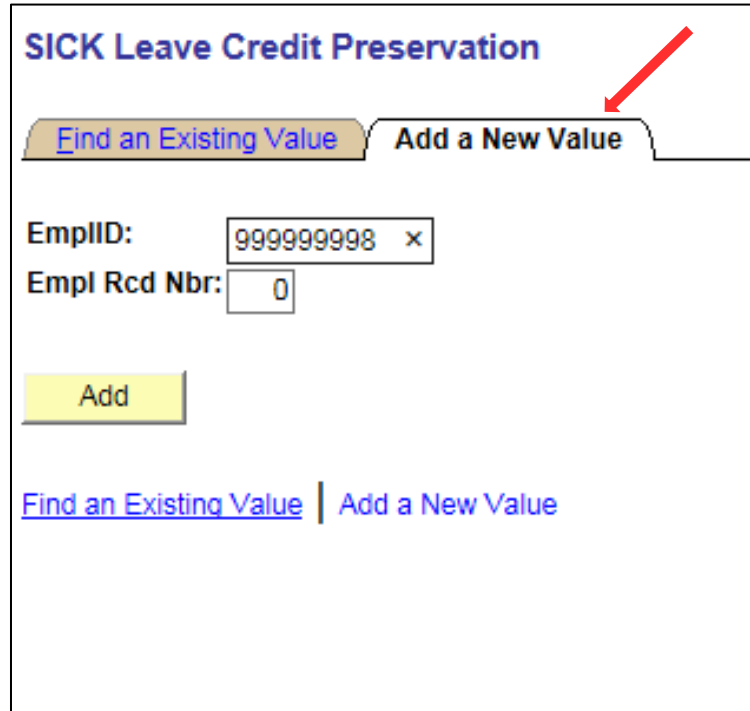
Sick Leave Credit Preservation

In NYBEAS, go to Benefits > Transactions > Sick Leave Credit Preservation



Sick Leave Credit Preservation

Select “Add a New Value,” then enter the Employee ID number and click “Add”



SICK Leave Credit Preservation

[Find an Existing Value](#) **Add a New Value**

EmplID:

Empl Rcd Nbr:

[Find an Existing Value](#) | [Add a New Value](#)

Sick Leave Credit Preservation

Enter Sick Leave Type, Hours, Standard Hours/Week, Annual Salary, Benefits Eligible service dates, then click Save

Sick Leave Credit Preservation

Sick Leave Credit Preservation

Employee Information
SAMPLE, SALLY EmplID: 999999998 Empl Rcd #: 0

Employee Address
Address Line 1 SUNNY STREET
City ALBANY
State NY
Postal Code 12239

Sick Leave Credit Information Find | View All First 1 of 1 Last

Sick Leave Type Actuarial Dual

Effective Date 09/26/2019 **Hours** 100.00 **Std Hrs/Wk** 7.50 **Annual Salary** 52000.000

Current Agency ***Benefits Eligible Service From** 01/01/1995 ***Benefits Eligible Service Thru** 08/03/2019

Employment Information

Negotiating Unit 05 Professional Scientific/Tech
Current Agency 08000 NYS Dept Of Civil Service
Retirement System Employee Member of 1 **Retirement Registration Number**

Save **Return to Search** **Notify** **Add** **Update/Display** **Include History**

Determine Medicare Eligibility

Medicare

- If the employee or their eligible dependent(s) are eligible for Medicare, you must leave a comment in NYBEAS with their Medicare information
- Most individuals become Medicare eligible at age 65, but some become eligible earlier due to disability, End Stage Renal Disease (ESRD), or Amyotrophic Lateral Sclerosis (ALS)

Medicare

In NYBEAS, go to Benefits > History > CMS/RDS Data

The screenshot shows the NYBEAS Benefits menu. The 'Benefits' section is highlighted in blue. Below it, there are three columns of menu items. The 'History' column contains a list of options, with 'CMS/RDS Data' circled in red. The 'Plan History' and 'Transactions' columns also contain lists of options.

Main Menu >

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

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

- [NYBEAS Update History](#)
- [Archived Accounting](#)
- [Billing Options](#)
- [Direct Pay Transaction ID](#)
- [Employee Compact History](#)
- [Employee Information Changes](#)
- [Enrollee Supplemental E-Box](#)
- [DP Enrollee Billing Number](#)
- [Medicare Elig 65 Letters](#)
- [Letter Notification](#)
- [Life Insurance Premium](#)
- [Med Advantage HMO Transactions](#)
- [National Medical Support Order](#)
- [OOP Eligibility History](#)
- [Sick Leave History](#)
- [OSC Salary Grade Inquiry](#)
- [OSC Unsettled Group](#)
- [Audit](#)
- [Blue Cross](#)
- [Carrier](#)
- [CMS/RDS Data](#)
- [DEAS](#)
- [Conversion Data](#)

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

- [Broadcast Messages](#)
- [Flat Rate Summary](#)
- [Message Agent Log](#)
- [Review NYBEAS/NYSTEP JobCodes](#)
- [Department Data](#)
- [Agency Recon Report Inquiry](#)

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

- [Young Adult Enrollment](#)
- [Benefit Plan Change](#)
- [Benefit Program Change](#)
- [Billing Option Change](#)
- [Cancel Enrollment](#)
- [Change Coverage](#)
- [COBRA Disability](#)
- [Comments](#)
- [Contribution Rate Change](#)
- [Corrections Requests](#)
- [Unsettled Grp Contribution Chg](#)
- [Dependent Add](#)
- [Dependent/Beneficiary](#)
- [Dependent Delete](#)
- [EGWP Manual Action Page](#)
- [Empire Card Request/History](#)
- [Enroll/Waive Benefits](#)
- [Federal Qualification Change](#)
- [Letter Notification](#)
- [Marriage Domestic Partner](#)
- [Medicare Change](#)
- [Medicare Part D Change](#)
- [MRX Exception](#)
- [National Medical Support Order](#)






Medicare

Select VDSA Query Only

[Main Menu](#) > [Benefits](#) > [History](#) >

CMS/RDS Data

Contains pages for tracking data received and sent to CMS (Center for Medicare/Medicaid Services) and RDS (Retiree Drug Subsidy).

 MSP (Actives) MSP (Actives)	 Non-MSP (Inactives) Non-MSP (Inactives)	 RDS Covered Retirees RDS Covered Retirees
 RDS Weekly Notification RDS Weekly Notification	 VDSA Query Only VDSA Query Only	

Medicare

Enter the employee's SSN and click Search

VDSA Query Only


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

Find an Existing Value

Social Sec Number:

EmplID:

Empl Rcd Nbr:

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

Medicare

Verify if there are enrollment dates for Medicare Part A and Part B

VDSA Query Only

Contract Holder Info
 EmpID: 123456789 EmpIRcd#: 0 Smith John

Member Info
 SSN: 123-45-6789 Dep/Benef: 01 Smith J

Input/Response Data Customize | Find | View All | First 1 of 1 Last

DC Number	Medicare Reason	Part A Effdt	Part A TermDt	Part B Effdt	Part B TermDt	Part D num	Part D Effdt	Part D TermDt
	Working Aged	05/01/2009		05/01/2009	04/30/2019	S5601	04/01/2019	

Member Archive Information Customize | Find | View All | First 1-2 of 63 Last

Input/Response Archive Data [No Title] | Disposition Info | ESRD Data

DC Number	Medicare Reason	Part A Effdt	Part A TermDt	Part B Effdt	Part B TermDt	Part D num	Part D Effdt	Part D TermDt
	Working Aged	05/01/2009		05/01/2009	04/30/2019	S5601	04/01/2019	
	Working Aged	05/01/2009		05/01/2009	04/30/2019	S5601	04/01/2019	

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

Medicare

Enter each dependent's SSN to verify if there are enrollment dates for Medicare Part A and Part B

VDSA Query Only


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

Find an Existing Value

Social Sec Number:

EmplID:

Empl Rcd Nbr:

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

Medicare

Create a comment informing EBD of Medicare information for the employee and any covered dependents and then click Save

Benefit Comments

SAMPLE, SALLY EmplID: 999999998 Empl Rcd #: 0

Employee Status: Active

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

Dependent/Beneficiary ID:

*Comment Date: Action Date:

Comments By:

Comment:

Medicare

- If the employee or any covered dependents are eligible for Medicare and NYBEAS only has a P.O. Box listed for the address, you must reach out to the employee for a physical address. The Centers for Medicare and Medicaid Services (CMS) require a physical address on file
- The PO box can remain as the mailing address, but the home address must be added to NYBEAS

Checklist

Checklist

- Confirm that the employee meets all three eligibility requirements
 - Review the NYBEAS Job Tab to confirm the employee has completed the minimum service requirement for your agency
 - Review the NYBEAS Personal Tab to confirm the employee is eligible to retire as a member of a retirement system
 - Review the NYBEAS Benefits Tab to confirm the employee is enrolled in NYSHIP

- Review the NYBEAS Personal Tab and Dependents Tab to confirm that personal information (Name, SSN, Address, etc.) is correct

Checklist

- Update NYBEAS with change requests submitted by the employee
- Update Workforce Administration in NYBEAS with the appropriate action/reason codes
- Update Sick Leave Credit
- Check for a Deferral Form. If employee is deferring:
 - Add a comment in NYBEAS
 - Update Sick Leave Credit Preservation in NYBEAS, if applicable
 - Forward EBD the Deferral Form and proofs

Checklist

- Check NYBEAS VDSA for Medicare enrollment
- Add a comment in NYBEAS with Medicare information for the employee and dependents (as applicable)
- Add any other relevant information into NYBEAS Comments Tab
- Check NYBEAS Update History to make sure all your work has been saved

Conclusion