



Department of  
Civil Service

**The presentation will start  
momentarily**

DECEMBER 16, 2024



Department of  
Civil Service

# 2024 Annual Webinar for Participating Agencies

Prepared for use by the Department of Civil Service, Employee Benefits Division  
representatives only.

DECEMBER 16, 2024



# Agenda

- A Message from the Director of EBD
- Benefits Administration from PA/PE Unit
- PELU Announcements
- Empire Plan Benefit Changes
- Financial Update
- Questions and Answers



## **A Message from the Director of EBD**

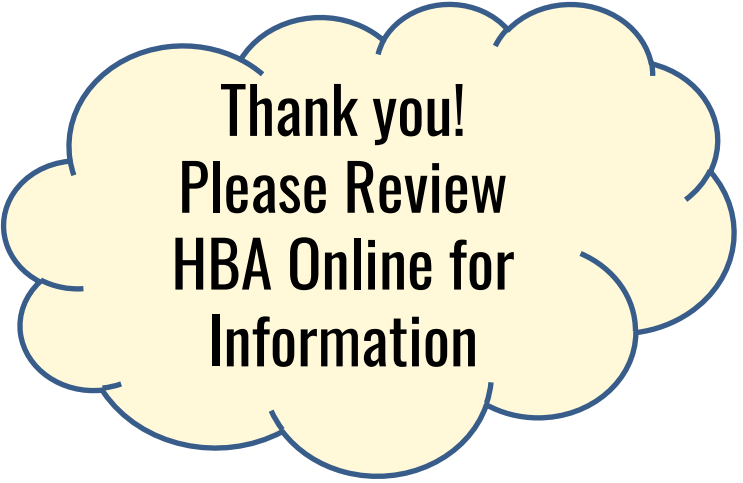
**Presenter – Daniel Yanulavich, Employee Benefits Division Director**

# Message from the Director

**Daniel Yanulavich**

518-473-1977

Daniel.Yanulavich@cs.ny.gov



Thank you!  
Please Review  
HBA Online for  
Information

# **Benefits Administration**

**Presenter –Michael Jones, PA/PE Unit Supervisor**

# PA/PE Unit Topics

- HBA Help Line and Agency Permissions
  - EBD Phone and Fax
  - ITS (NYBEAS Password Resets)
  - HBA/DAO Access
- NYBEAS Transactions
  - Retirements
  - Terminations Vs. Cancel Enrollment
  - Preferred Payment Changes
  - Correction Requests
- Billing Reconciliation
  - Bills/Reconciliation Reports/Activity Listing
- HBA Online and HBA Manual
  - Step-by step instructions designed for HBAs



# **HBA Help Line and Agency Permissions**

# EBD Phone and Fax

## **HBA Help Line Phone:** (518) 474-2780

Press 1 for English, and then 2 for PA/PE HBA.

Representatives are available to answer questions Monday Tuesday, Thursday, and Friday from 9AM -3PM and on Wednesdays from 9AM – 12 PM.

## **HBA Help Line Fax:** (518) 485-5590

Send documents in with a cover letter that labels your name and agency code.

We cannot accept faxes that include information on multiple enrollees. Faxes should only include info for one enrollee at a time.

# ITS (NYBEAS Password Resets)

For password reset assistance with NYBEAS or HBA Online, you must contact the NYS IT department:

Phone: 844/891-1786

Email: [fixit@its.ny.gov](mailto:fixit@its.ny.gov)

**The HBA Help Line cannot reset an HBA password**

# HBA and DAO Access

Data Access Officers (DAO) at your agency must:

- Access the Online Civil Service Permission Request System (OCSPR) on the Civil Service Website
- Add permissions for new HBAs
- Remove permissions for former HBAs
- Comment whether the HBA should be on the EBD contact list

You are allowed to have more than one DAO, but the DAO cannot also be the HBA.

A DAO can be added or removed by submitting an *EBD-545 Data Access Officer Request Form*

# HBA and DAO Access

Health Benefits Administrators (HBA) at your agency must:

- Access NYBEAS and HBA Online to make updates in a timely manner
- Contact the HBA Help Line when unable to update NYBEAS correctly
- Fax information to EBD when necessary

HBAs can only be added or removed by your agency DAO through OCSPR. Documents send to EBD will not be accepted.

An agency is allowed to have multiple HBAs.

More info on HBA roles/responsibilities and user permissions are outlined on HBA Online in :

- HBA memo *PA20-22 Health Benefit Administrator Responsibilities*
- HBA memo *PA24-09 NYBEAS Access and HBA Online Access*

# **NYBEAS Transactions**

# NYBEAS Transactions - Retirement

An employee from a PA must meet **all four** of the following eligibility requirements to continue NYSHIP coverage in retirement. The employee must:

1. Be in a class or category of employee that is eligible for coverage in retirement
2. Have completed the agency's minimum service requirement
3. Satisfy requirements for retiring as a member of a retirement system
4. Be enrolled in coverage through an employer that participates in NYSHIP

# NYBEAS Transactions - Retirement

**1. The employee must be in a class or category of employee that is eligible for coverage in retirement.**

A Participating Agency that offers to extend NYSHIP benefits into retirement may do so for all classes or categories of employees or only for certain classes or categories of employees. The employee must be employed in a position that is in an eligible class or category.



# NYBEAS Transactions - Retirement

**2. The employee must have completed the agency's minimum service requirement.**

## NYSHIP Service Requirements

NYSHIP requires at least five years of benefits-eligible service. The service does not need to be continuous.

# NYBEAS Transactions - Retirement

## **2. The employee must have completed the agency's minimum service requirement.**

### Agency Service Requirements

For employees hired on or after April 1, 1975, your agency may elect — administratively or through collective bargaining — to establish a service requirement greater than five years. This requirement may apply to all employees or to one or more classes or categories of employees.

The employee must have a minimum of one year of qualifying service with your agency to be eligible to continue NYSHIP coverage in retirement as your retiree.

# NYBEAS Transactions - Retirement

## **3. The employee must satisfy requirements for retiring as a member of a retirement system**

The employee must be qualified for retirement as a member of a retirement system administered by New York State or any of New York State's political subdivisions.

If the employee is not a member of one of these retirement systems, they must meet the age requirement of the NYSLRS retirement tier in effect at the time they last entered service or be qualified to receive Social Security Disability Insurance benefits.

# NYBEAS Transactions - Retirement

## 3. The employee must satisfy requirements for retiring as a member of a retirement system

To satisfy this eligibility requirement, an employee must be eligible for a pension but **does not need to collect their pension.**

# NYBEAS Transactions - Retirement

## **4. Be enrolled in coverage through an employer that participates in NYSHIP.**

This includes enrollment in:

- NYSHIP as an enrollee or dependent
- An alternative health benefit option provided by your agency
- A buyout program provided by your agency

# NYBEAS Transactions - Retirement

When an enrollee meets all 4 requirements, you must process a RET/RET in NYBEAS Workforce Administration to confirm the member established eligibility to continue NYSHIP coverage as a retiree.

If they wish to cancel their enrollment upon separation, process a RET/RET and then a Cancel Enrollment.

# NYBEAS Transactions - Retirement

If the enrollee is not collecting their pension or not “retiring” but is eligible to collect their pension upon separation from your agency, then you should still be processing a retirement if they meet all other requirements.

If they meet the 4 requirements, then they are entitled to continue their coverage as a NYSHIP retiree through your agency.

# Disability Retirement

**Disability Retirements must be sent to EBD for processing.**

When an employee's NYBEAS record needs to be updated due to a disability retirement you must fax all required documentation with a cover letter to EBD for review and processing.

The enrollee must provide a letter from their retirement system that confirms their approved start date of retirement benefits.

If the letter that the enrollee provides you with does not confirm the approved start date, then it will not be accepted by EBD.



# Disability Retirement

Fax the following information to EBD:

- A cover letter, identifying yourself and confirmation that the employee has met all requirements to continue NYSHIP coverage in retirement.
- A copy of a letter from the enrollee's retirement system that confirms the approved start date of retirement benefits.
- A completed and signed PS-503 Health Insurance Transaction Form.

There is more information on the [\*Disability Retirement and NYSHIP\*](#) page in the [PA Manual](#).

# **NYBEAS Transactions – Terminations Vs. Cancel Enrollment**

Terminations should be processed when an employee separates service from your agency and does not meet the eligibility requirements to continue NYSHIP in retirement through your agency.

A TER/TER in NYBEAS Workforce Administration will terminate employment with your agency in NYBEAS and will also cancel their NYSHIP enrollment.

If you process a Cancel Enrollment, but not a termination, the individual will not be able to be rehired with another NYSHIP agency.

# NYBEAS Transactions – Preferred Payment

Before processing a Preferred Payment Change (PPC), use the **Personal/Employment transaction** in NYBEAS to enter the employees:

- Retirement Registration Number,
- Retirement System
- Retirement Tier

The Retirement Registration Number must be inserted accurately, or the change will not go through.

If you are unsure of the number, confirm with the employee.

If a Retirement Number is inserted, the PPC will be blocked so make sure you leave that field blank when processing a Preferred Payment Change transaction.

# Personal/Employment Transaction

Retirement Information			
Retirement Reg.#:	<input type="text" value="R123456789"/>	Medicare Id:	<input type="text"/>
Retirement System	<input type="text" value="1"/> Employee's Retirement System	Retirement Number:	<input type="text"/>
Retirement Type:	<input type="text" value="REGULAR"/>	Retirement Tier:	<input type="text" value="Tier IV"/>

Leave the Retirement Number field blank!

# Preferred Payment Changes

Preferred Rate Qualifier				Find   View All	First ◀ 1 of 1 ▶ Last
Action Dt.	Effsec	*Preferred Pay Method	User ID		
11/08/2022	0	<input type="text"/>	MKJ2	<input type="button" value="+"/> <input type="button" value="-"/>	

Preferred Rate Qualifier *** PA enrollees only ***				Find   View All	First ◀ 1 of 1 ▶ Last
Action Dt.	Effsec	*Preferred Rate Qualifier	User ID		
11/08/2022	0	<input type="text"/>	MKJ2	<input type="button" value="+"/> <input type="button" value="-"/>	

→

**Do NOT process a PPC until at most 2 weeks prior to retirement!**

# Preferred Rate Qualifiers

These are the rates of contribution from the employer that you can choose in NYBEAS. If the amount your agency contributes does not match any of the below, you cannot put your retiree into pension deduction and you must keep them in APAY.

Code	Rate Qualifier
0	100/100
1	100/95
2	100/90
3	100/80
4	100/75
5	100/65
6	100/50
7	100/35
8	95/95
9	95/85

Code	Rate Qualifier
A	90/90
B	90/85
C	90/75
D	90/50
F	85/85
G	85/75
H	85/50
I	75/75
J	75/50
K	75/35

Code	Rate Qualifier
L	65/46
M	60/60
N	50/50
O	50/35
P	95/90
Q	95/80
R	90/80
S	80/80
U	83/83
Y	85/80

System	Maximum Deduction
ERS	\$999
TRS	\$2000

# NYBEAS Transactions - Correction Requests

HBAs can submit Correction Requests in NYBEAS when an enrollee's record needs to be corrected or when their record needs an update that an HBA is unable to process.

The Corrections Requests transaction can be used to view existing correction request or add a new correction request.

HBAs must enter the complete details of their request in the Correction Request transaction so EBD can understand what is being requested and confirm that the update is compliant with NYSHIP rules.

# Corrections Requests Transaction

Menu

Search:

- My Favorites
- Benefits**
- History
- Plan History
- Transactions
- Billing
- COBRA
- MyNYSHIP
- NYBEAS Processes
- NYBEAS Reports
- NYSTEP Review
- EBD Call Center
- Data Corrections
- Workforce Administration
- System Announcement
- Workforce Monitoring
- Set Up HRMS
- Worklist

Main Menu >

## Benefits

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

### History

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

- [NYBEAS Update History](#)
- [Archived Accounting](#)
- [Billing Options](#)
- [Direct Pay Transaction ID](#)
- [Employee Compact History](#)
- [Employee Information Changes](#)
- [Medicare Elig 65 Letters](#)
- [Letter Notification](#)
- [Life Insurance Premium](#)
- [National Medical Support Order](#)
- [OOP Eligibility History](#)
- [Sick Leave History](#)
- [OSC Salary Grade Inquiry](#)
- [OSC Unsettled Group](#)

### 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

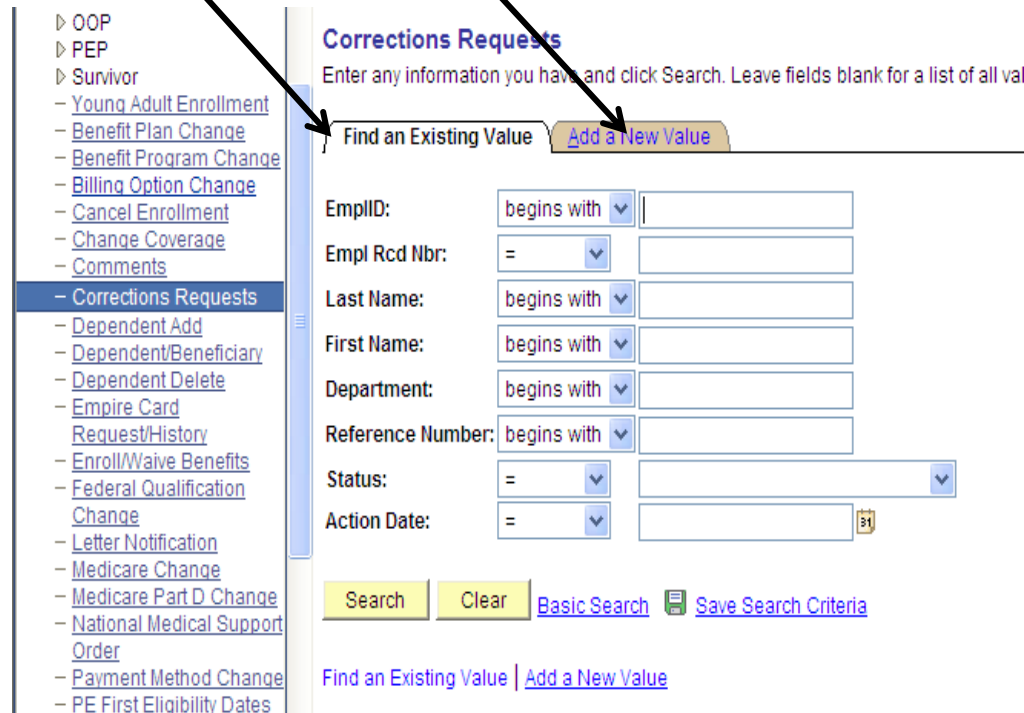
Allows for the processing of NYBEAS transactions to change an enrollee's coverage.

- [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](#)



# Corrections Requests Transaction

Click ***Find an Existing Value*** to search a correction request that has already been submitted. Click ***Add a New Value*** to start a new correction request



The screenshot shows the 'Corrections Requests' transaction interface. On the left is a navigation menu with various options, including 'Corrections Requests' which is currently selected. The main area has a title 'Corrections Requests' and a subtitle 'Enter any information you have and click Search. Leave fields blank for a list of all val'. Below this are two buttons: 'Find an Existing Value' and 'Add a New Value'. Two arrows originate from the text above: one points to the 'Find an Existing Value' button and the other points to the 'Add a New Value' button. Below the buttons is a search form with fields for: EmplID (dropdown 'begins with'), Empl Rcd Nbr (dropdown '='), Last Name (dropdown 'begins with'), First Name (dropdown 'begins with'), Department (dropdown 'begins with'), Reference Number (dropdown 'begins with'), Status (dropdown '='), and Action Date (dropdown '=' with a calendar icon). At the bottom are 'Search' and 'Clear' buttons, followed by links for 'Basic Search' and 'Save Search Criteria'. At the very bottom, there are links for 'Find an Existing Value' and 'Add a New Value'.

Corrections Requests

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

Find an Existing Value Add a New Value

EmplID: begins with

Empl Rcd Nbr: =

Last Name: begins with

First Name: begins with

Department: begins with

Reference Number: begins with

Status: =

Action Date: =

Search Clear Basic Search Save Search Criteria

Find an Existing Value Add a New Value

# Corrections Requests - Add a New Value

The screenshot displays the NYBEAS HBEAS web application interface. At the top left is the logo "NYBEAS HBEAS". A navigation menu on the left lists various options, with "Corrections Requests" highlighted. The main content area is titled "Corrections Requests" and contains two tabs: "Find an Existing Value" and "Add a New Value". The "Add a New Value" tab is active. Below the tabs, there are input fields for "EmplID:" and "Empl Rcd Nbr:". An annotation "Enter SSN Here" with an arrow points to the "EmplID:" field. Below these fields is a yellow "Add" button, with an arrow pointing to it. At the bottom of the main area, there are links for "Find an Existing Value" and "Add a New Value". The top right of the page includes links for "Home", "Worklist", "Add to Favorites", and "Sign out", along with a "New Window" button.

NYBEAS  
HBEAS

Home Worklist Add to Favorites Sign out

Menu

- Transactions
  - Employee Life
  - OOP
  - PEP
  - Survivor
  - Young Adult Enrollment
  - Benefit Plan Change
  - Benefit Program Change
  - Billing Option Change
  - Cancel Enrollment
  - Change Coverage
  - Comments
  - Corrections Requests**
    - Dependent Add
    - Dependent/Beneficiary
    - Dependent Delete
    - Empire Card Request/History
    - Enroll/Waive Benefits

Corrections Requests

Find an Existing Value Add a New Value

EmplID:  ← Enter SSN Here

Empl Rcd Nbr:

Add ←

Find an Existing Value | Add a New Value

New Window http

# NYBEAS Transactions - Correction Requests

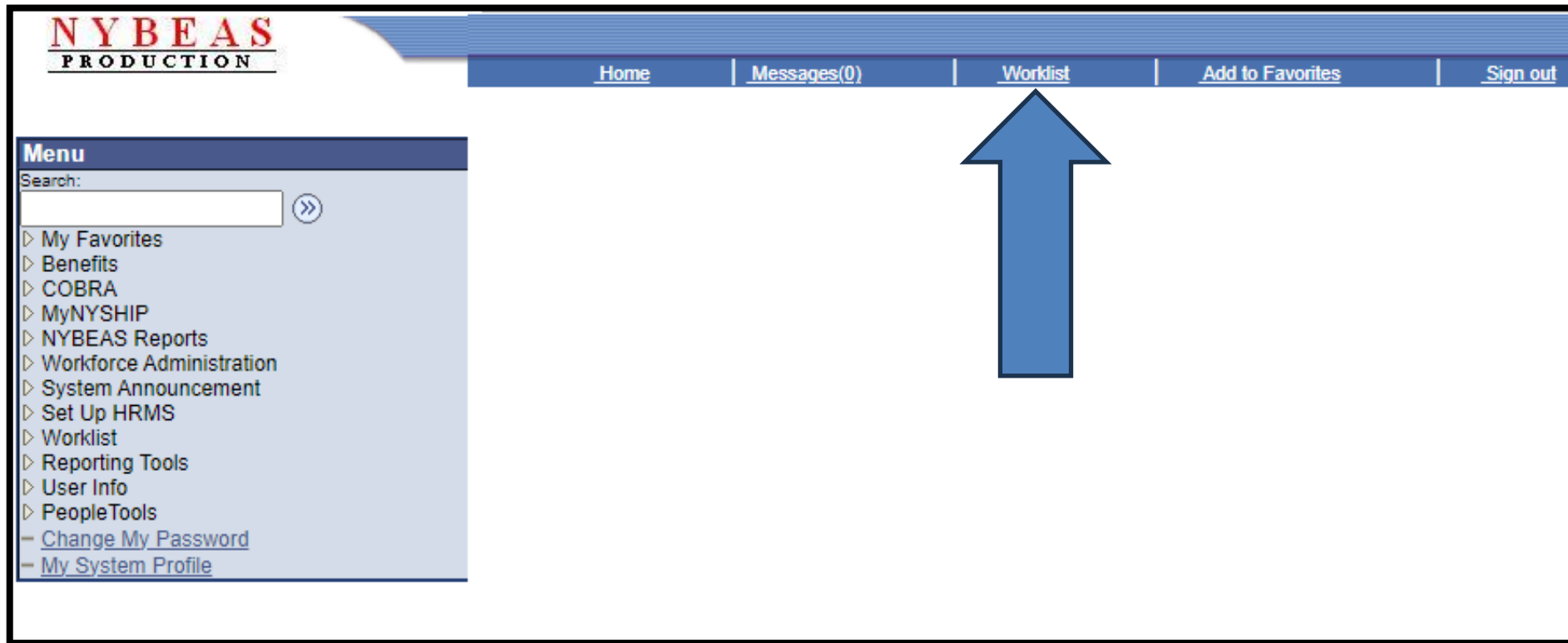
HBAs must follow up on Correction Requests that were submitted to confirm whether the requested update was processed or not.

After a correction request is reviewed and updated by staff at the Employee Benefits Division (EBD), the request will be sent back to your Corrections Worklist for review.

Further processing is often required by the HBA after a correction request has been completed by EBD.







# Corrections Requests Worklist

Click Worklist from the upper right corner of NYBEAS



# Corrections Requests Worklist

From your *Worklist Summary* click *Detail* to open your Corrections Requests Worklist

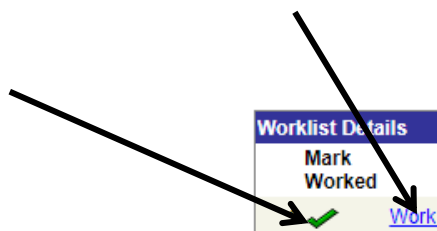
Worklist Summary					Customize   Find   View All   	First  1-6 of 7  Last
	Detail	Filter	Business Process	Activity	Worklist	Count
1	<a href="#">Detail</a>	<a href="#">Filter</a>	Administer Workflow	Send Note	<Target Roleusers>	46
	<a href="#">Detail</a>	<a href="#">Filter</a>	Online Corrections	Correction Complete	Correction Complete	2612
3	<a href="#">Detail</a>	<a href="#">Filter</a>	Online Corrections	Correction Invalid (HBA)	Correction Invalid	376
4	<a href="#">Detail</a>	<a href="#">Filter</a>	NYBEAS Payment Method Change	NYBEAS Payment Method Change	PA Pension Deductions <HBAs>	408
5	<a href="#">Detail</a>	<a href="#">Filter</a>	NYBEAS Administer Workforce	NYBEAS Hire Notifications	Incomplete Personal Dat <HBA>	137
6	<a href="#">Detail</a>	<a href="#">Filter</a>	NYBEAS Administer Workforce	NYBEAS Hire Notifications	New Enrollment <HBA>	3265
Field 1: <input type="text"/>  Field 2: <input type="text"/>  Field 3: <input type="text"/>  <a href="#">Sort</a> <a href="#">Save Comments</a>						







# Correction Requests Worklist

Click *Work It* to open the correction Request and review whether the status is Complete or Invalid and to review any comments from EBD.

Navigate to NYBEAS Update history to determine if NYBEAS was updated how you intended.

Remove the correction from your worklist by clicking *Mark Worked*



Worklist Details										
Customize   Find   View 100   First 1-15 of 2612 Last										
Mark Worked	ID	Empl Rcd#	DeptID	Name	Ref. Nbr.	Sent From	WL Created on	WL Comments	Reassign	
 <a href="#">Work It</a>		0	03977		222672	Tibbitts, Michael	06/22/2020 2:13:28PM		<a href="#">Reassign</a>	
2  <a href="#">Work It</a>		0	03613		222738	Tibbitts, Michael	06/22/2020 3:32:30PM		<a href="#">Reassign</a>	
3  <a href="#">Work It</a>		0	03228		222691	Tibbitts, Michael	06/22/2020 3:33:54PM		<a href="#">Reassign</a>	
4  <a href="#">Work It</a>		0	03038		222850	Tibbitts, Michael	06/23/2020 2:26:19PM		<a href="#">Reassign</a>	
5  <a href="#">Work It</a>		0	03145		222857	Tibbitts, Michael	06/24/2020 1:07:20PM		<a href="#">Reassign</a>	
6  <a href="#">Work It</a>		0	03300		222901	Spring, Melissa	06/25/2020 9:25:52AM		<a href="#">Reassign</a>	
7  <a href="#">Work It</a>		0	03496		222853	Tibbitts, Michael	06/25/2020 12:54:27PM		<a href="#">Reassign</a>	

# Correction Requests Worklist

If EBD determines the correction cannot be processed the Status will be changed to *Invalid Return to HBA*.

The *Comments Tab* will inform if further processing is needed or of the reason why the correction request was marked Invalid.

Call the Help Line for assistance if you are unsure why a correction was returned invalid or not completed as you intended.

# Corrections Request Example

This comment indicates that further processing is needed by the HBA. EBD Corrections Unit deleted information in NYBEAS. The HBA must now process the needed transaction for the correct date. If not done by the HBA, the processing will not be completed, and larger issues may arise. This is why you must follow up on your correction requests.

The screenshot displays a web application interface for a Corrections Request. At the top, there are four tabs: 'Header Request', 'Correction Request' (which is selected), 'Comments', and 'Billing & EBD Corrections'. Below the tabs, the following information is displayed:

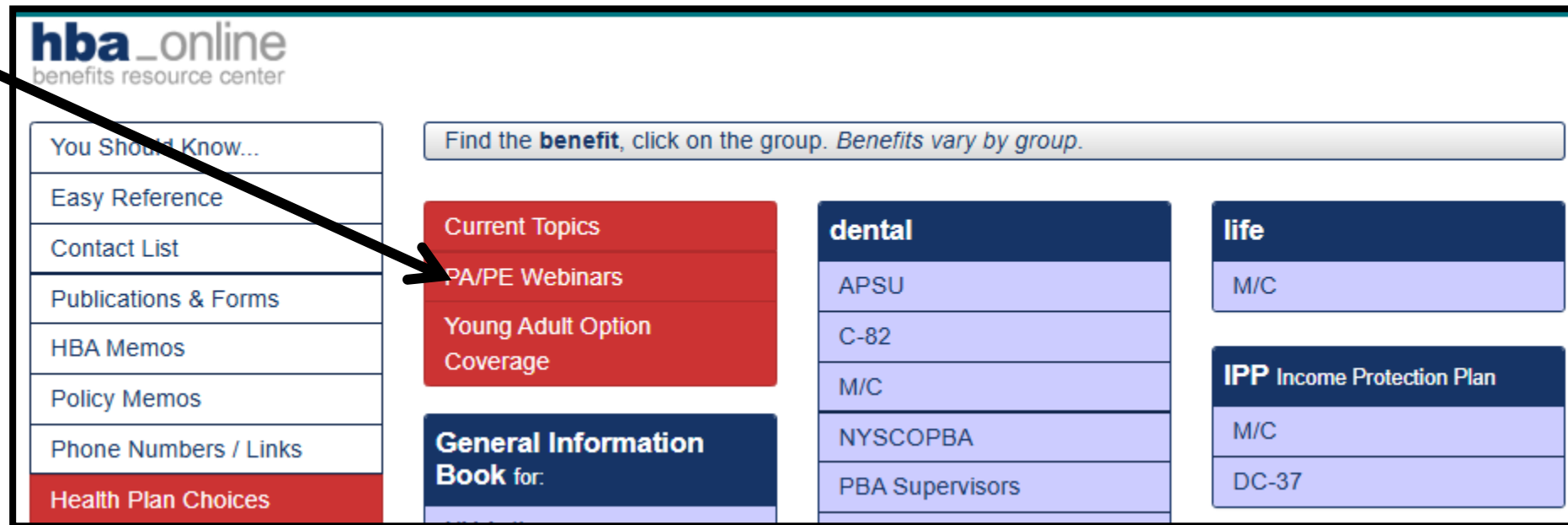
- EmplID: 123123123
- NAME: ENROLLEE
- Empl Rcd#: 0
- Ref#: NEW
- \*Status: **COMF** (with a magnifying glass icon) Complete

Below this information is a section titled 'Existing Comments' with a search bar and navigation controls (Find | View All, First, 2 of 2, Last). A comment box contains the text: 'Rehire and enrollment have been deleted. HBA can re-process for the correct date. - OPPAUD (OPPAUPD 2023-11-24 11:10)'. Below the comment box is a section titled 'Enter your comments below & click on Add Comments.' with a text input area and an 'Add Comments' button. An arrow points to the 'COMF' status field.



# NYBEAS Transactions – Correction Requests

There are more instructions on submitting Correction Requests in the 2023 Annual NYSHIP Participating Agency Webinars which can be found on [HBA Online](#) or in [HBA Memo PA24-01 2023 Annual NYSHIP Participating Agency Webinars – Video, PowerPoint, and Q&A](#)



**hba\_online**  
benefits resource center

You Should Know...  
Easy Reference  
Contact List  
Publications & Forms  
HBA Memos  
Policy Memos  
Phone Numbers / Links  
Health Plan Choices

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

**Current Topics**  
PA/PE Webinars  
Young Adult Option Coverage

**General Information Book for:**

**dental**  
APSU  
C-82  
M/C  
NYSCOPBA  
PBA Supervisors

**life**  
M/C

**IPP Income Protection Plan**  
M/C  
DC-37

# NYBEAS Transactions

There are more instructions on how to properly view NYBEAS Update History and how to process other transactions in the PA NYBEAS Training on [HBA Online E-Learning](#).

## HBA Webinars

**2024 Option Transfer Period Webinar for NYS HBAs** Recorded November 30, 2023 (1 hour 33 minutes)

**2023 Special Option Transfer Period Webinar for NYS HBAs** Recorded April 19, 2023 (55 minutes)

**2023 Option Transfer Period Webinar for NYS HBAs** Recorded November 22, 2022 (1 hour 52 minutes)

**Retroactive Sick Leave Adjustment Training** - Conducted August 19, 2021 (45 minutes)

**NYBEAS Training for NYSHIP Participating Agency HBAs** - Conducted via live WebEx on May 19, 2021 (1 hour 49 minutes).

**NYS HBA Training Part 1** - Conducted via live WebEx on May 21, 2019 (1 hour 8 minutes)

**NYS HBA Training Part 2** - Conducted via live WebEx on May 22, 2019 (1 hour 4 minutes)

**Processing NYSHIP PE Retirees in NYBEAS** - Updated July 2021 (33 minutes)

**Civil Service Institute - NYS HBA Training** - Held at the Department of Corrections and Community Supervision (DOCCS) on July 25, 2018 (43:24)

# **Billing Reconciliation**

# Billing Reconciliation

The Department of Civil Service sends out monthly billing statement by e-mail.

Transaction listings are no longer sent out with the monthly billing statements, but activity listings can be run in NYBEAS.

HBAs must run monthly reconciliation reports and activity listing reports in NYBEAS.

These reports assist Health Benefit Administrators maintain accurate, up-to-date health insurance enrollment records for their agency.

# Billing Reconciliation

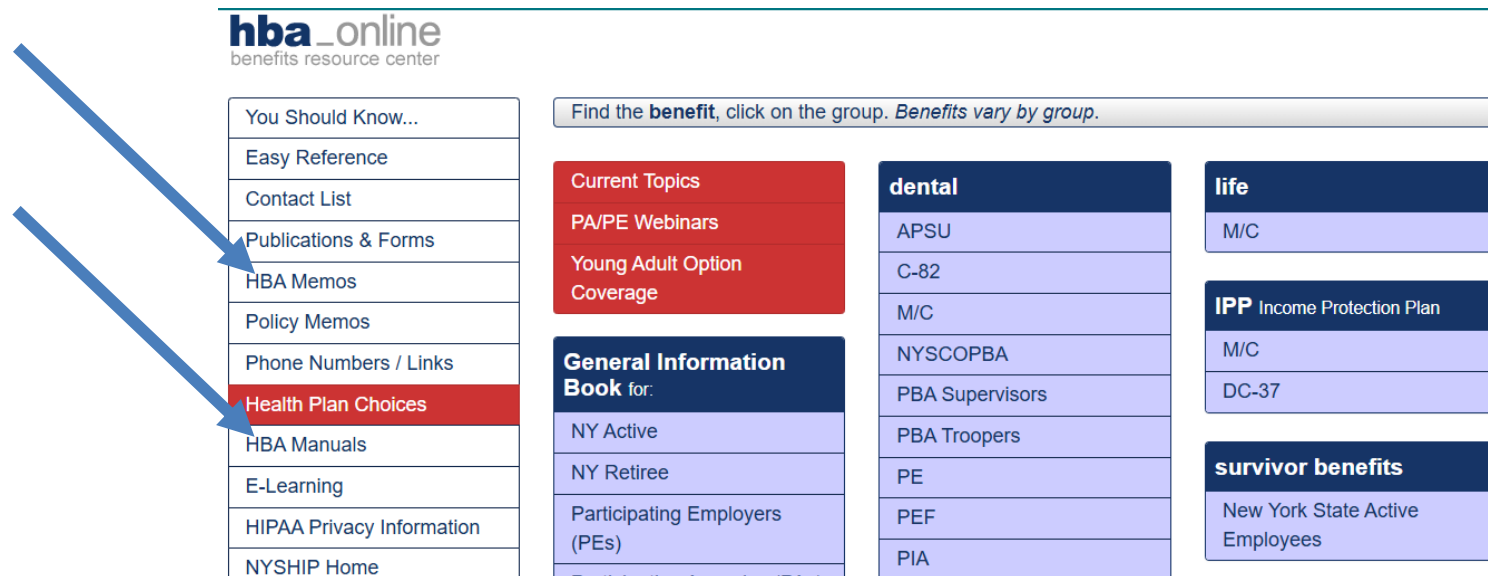
The reports should be run Monday morning following the first Friday of the month.

If any transactions occur in NYBEAS after billing runs, but before you run your reconciliation report, the information on your billing statement may not line up with the information on your recon report.

When this occurs, your activity listing can help you determine which changes may have occurred in NYBEAS to cause any discrepancies between your billing statement and recon report.

# Billing Reconciliation

Detailed instructions on running the reports as well as directions on how to reconcile the listing with monthly billing statements can be found in HBA memos and the PA Manual on HBA Online.



**hba\_online**  
benefits resource center

You Should Know...  
Easy Reference  
Contact List  
Publications & Forms  
HBA Memos  
Policy Memos  
Phone Numbers / Links  
**Health Plan Choices**  
HBA Manuals  
E-Learning  
HIPAA Privacy Information  
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)

**dental**  
APSU  
C-82  
M/C  
NYSCOPBA  
PBA Supervisors  
PBA Troopers  
PE  
PEF  
PIA

**life**  
M/C

**IPP** Income Protection Plan  
M/C  
DC-37

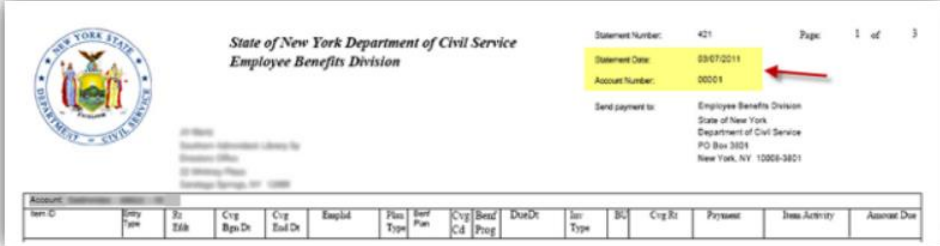
**survivor benefits**  
New York State Active Employees

# Billing Reconciliation

Instructions for running a Reconciliation Report can be found in [HBA Memo PA11-08 Reconciliation Listing](#).

Instructions For Running Reconciliation Report

To create your Reconciliation Report have your Billing Statement with you.



State of New York Department of Civil Service  
Employee Benefits Division

Statement Number: 421 Page: 1 of 3  
Statement Date: 03/07/2011  
Account Number: 00001  
Send payment to: Employee Benefits Division  
State of New York  
Department of Civil Service  
PO Box 3001  
New York, NY 10009-3801

Item ID	Entry Type	Bz	Elig	Cvg Bgn Dt	Cvg End Dt	Emp Id	Plan Type	Benef Plan	Cvg Cd	Benef Prog	Dist Dt	Ins Type	BU	Cvg Rt	Paymnt	Ins Authority	Amount Due
Account: 000001-00001-00001																	

To navigate to the Reconciliation Report Page sign into NYBEAS and follow the menu path below:  
**NYBEAS Reports → Agency Reconciliation Report**

Enter the *Account Number* from your **Billing Statement** into the **Department** field on the search page and click on the Search button.

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

Find an Existing Value

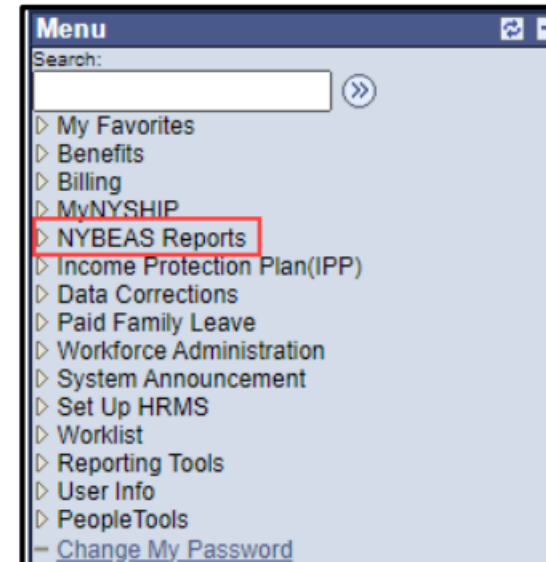
Department: begins with ▼ 00001

# Billing Reconciliation

Instructions for running an Activity Listing Report can be found in [HBA PA23-19 Activity Listing Report](#).

The Activity listing report identifies benefit events, card requests or personal data changes for an enrollee or its dependent(s) that have occurred during a defined time period. End-users can specify this time period by entering a from and a thru-date on the report page to generate the report for those Department Id's they have access to.

- From the NYBEAS homepage, select **NYBEAS Reports**







# Billing Reconciliation

For a guide on reconciling your NYSHIP bill, refer to the PowerPoint found in the PA Manual.

[HBA Online](#) > [HBA Manual](#) > [PA Manual](#) > [Cost of Coverage](#) > [Reconciling your NYSHIP Bill](#)

## Reconciling your NYSHIP Bill

If the information on your NYSHIP Bill does not reflect your enrollment records, you will need to reconcile the differences between the two. For a guide on reconciling your NYSHIP bill,  [Click here](#). 

You may also use the  [NYBEAS Code Description Guide](#) to assist you.

If you have reviewed the guide and still cannot resolve your discrepancy, you may contact the [HBA Help Line](#) for assistance.

# **HBA Online and HBA Manual**

# HBA Online and HBA Manual

HBA Online is a resource center for HBAs. You should always research questions here before contacting the HBA Help Line.

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

NYSHIP Eligibility Rules/Waiting Periods/Effective Dates

- PA Manual • NYSHIP General Information Book for PAs

NYSHIP Enrollee and Dependent Proofs

- PA Manual • Policy Memos • HBA Memos • NYSHIP General Information Book for PAs

# HBA Online and HBA Manual

HBA Online is a resource center for HBAs. You should always research questions here before contacting the HBA Help Line.

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

## NYBEAS Processing Instructions

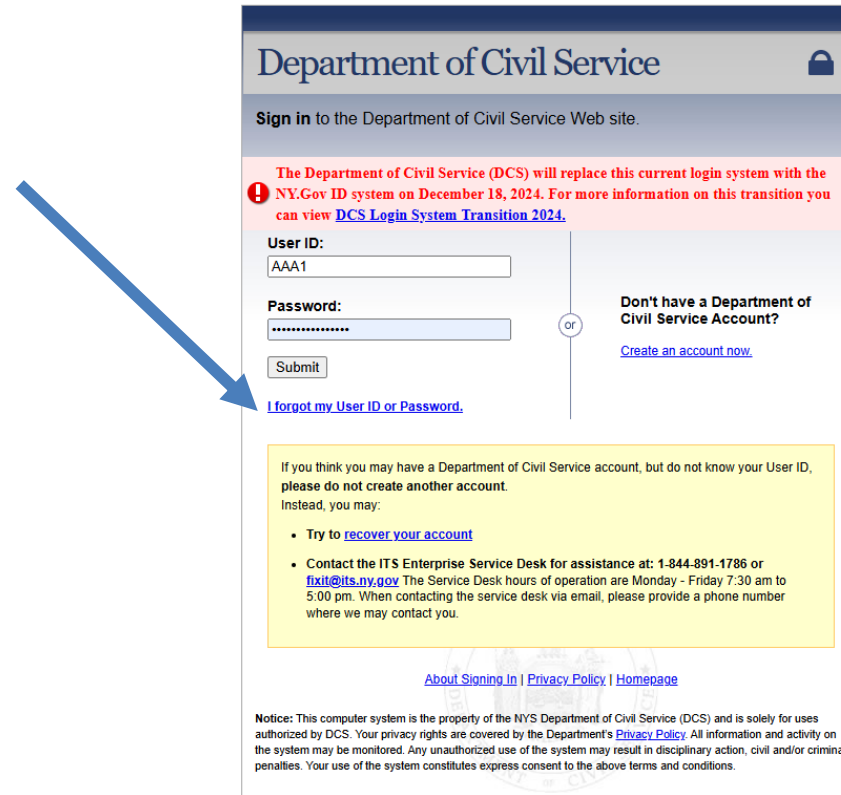
- PA Manual • E-learning page of HBA Online

## More HBA Online Resources

- Policy Memos • NYSHIP Online Publications • System Announcements
- HBA Online You Should Know • HBA Online Easy Reference • Notices
- Empire Plan contacts

# HBA Online and HBA Manual

If you are unsure of your User ID or Password for HBA Online, click “I forgot my User ID or Password”



The screenshot shows the Department of Civil Service login interface. At the top, it says "Department of Civil Service" with a lock icon. Below that, it says "Sign in to the Department of Civil Service Web site." A red banner contains a warning: "The Department of Civil Service (DCS) will replace this current login system with the NY.Gov ID system on December 18, 2024. For more information on this transition you can view [DCS Login System Transition 2024](#)." The login form has fields for "User ID:" (containing "AAA1") and "Password:" (masked with dots), with a "Submit" button. To the right, it says "Don't have a Department of Civil Service Account?" with a link "Create an account now." Below the form, a blue arrow points to the link "I forgot my User ID or Password." A yellow box contains instructions: "If you think you may have a Department of Civil Service account, but do not know your User ID, please do not create another account. Instead, you may:" followed by two bullet points: "Try to [recover your account](#)" and "Contact the ITS Enterprise Service Desk for assistance at: 1-844-891-1786 or [fixit@its.ny.gov](mailto:fixit@its.ny.gov). The Service Desk hours of operation are Monday - Friday 7:30 am to 5:00 pm. When contacting the service desk via email, please provide a phone number where we may contact you." At the bottom, there are links for "About Signing In", "Privacy Policy", and "Homepage", and a notice about the system's ownership and monitoring.

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# PA Manual



**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)
- Student Employee Health Plan (SEHP)

**dental**

- APSU
- C-82
- M/C
- NYSCOPBA
- PBA Supervisors
- PBA Troopers
- PE
- PEF
- PIA
- SEHP

**life**

- M/C

**IPP Income Protection Plan**

- M/C
- DC-37

**survivor benefits**

- New York State Active Employees

**workers' compensation**

- ARS Publications for

# PA Manual

## HBA Manuals

More manuals are coming soon!

NY Manual

View

PE Manual

View

PA Manual

View

## PA Manual

### Events

"Other" Child



Adopting a Child



Continuing Coverage for a Disabled Child



Divorce



Domestic Partner



### Topics

Dependent Eligibility Requirements



Employee Eligibility Requirements



Roles & Responsibilities



Student Dependent with Prior Military Service



The Health Insurance Portability and Accountability Act (HIPAA) and

### Search

Filter

UPDATES

TRANSACTIONS

GLOSSARY

CONTACT

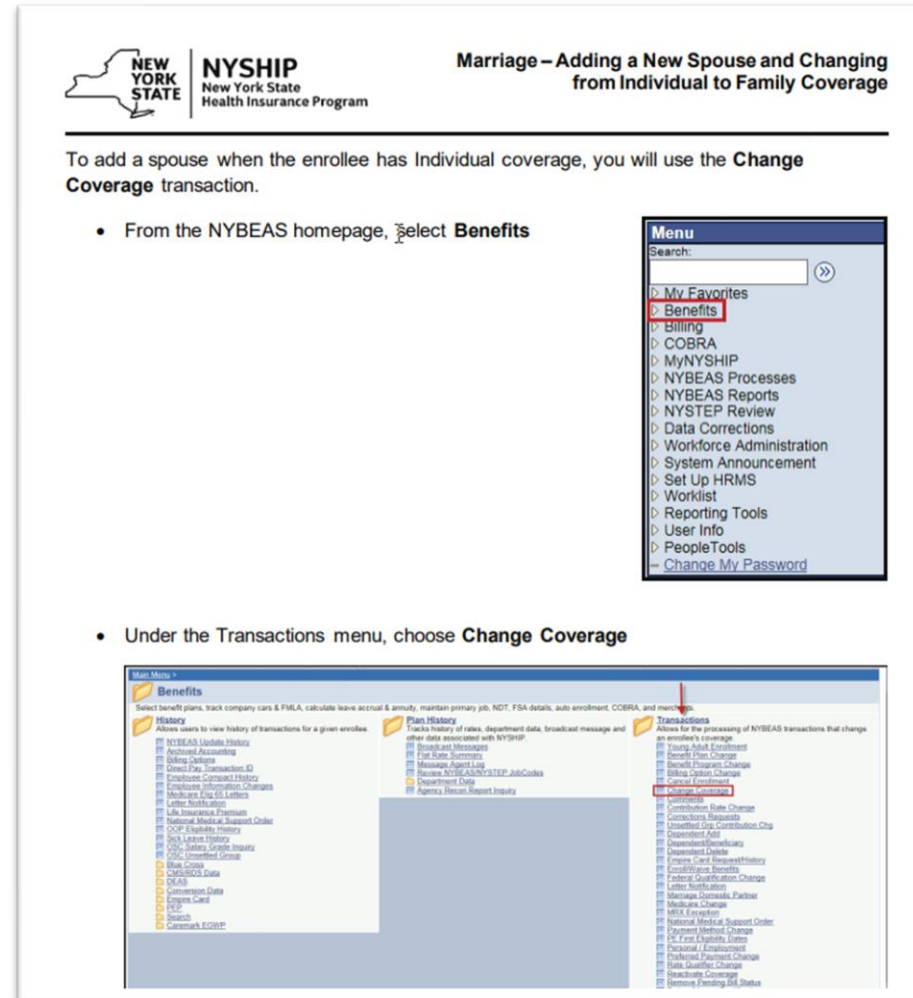
# PA Manual

## Transactions

Transaction Name	Action Code	Reason Code	Description	Sections
 <a href="#">Add a Spouse Coverage - Change to Family</a>	CCO	MAR	If an enrollee has Individual coverage, click on the link for instructions on how to add their spouse by changing to Family coverage.	<a href="#">Marriage</a>
 <a href="#">Add a Spouse to Existing Coverage</a>	DEP	ADD	If an enrollee has existing Family coverage, click on the link for instructions on how to add their spouse to coverage.	<a href="#">Marriage</a>
 <a href="#">Add Dependent Child - Change to Family Coverage</a>	CCO	DEP	If an enrollee requests to add a dependent child to coverage and change from Individual to Family Coverage	<a href="#">Adopting a Child</a>
 <a href="#">Add Dependent Child to Existing Family Coverage</a>	DEP	ADD, NWB	If an enrollee requests to add a dependent child to existing Family Coverage	<a href="#">Adopting a Child</a>
 <a href="#">Add Domestic Partner - Change to Family Coverage</a>	CCO	ADP	If an enrollee has Individual coverage, click on the link for instructions on how to add their domestic partner by changing to Family coverage.	<a href="#">Domestic Partner</a>
 <a href="#">Add Domestic Partner to Existing Family Coverage</a>	DEP	ADP	If an enrollee has existing Family coverage, click on the link for instructions on how to add their domestic partner to coverage.	<a href="#">Domestic Partner</a>
 <a href="#">Add Newborn - Change to Family</a>	CCO	NWB	If an enrollee with Individual coverage who are adding their newborn.	<a href="#">Newborn Child</a>



# PA Manual - Transaction



# HBA Online and HBA Manual

This manual has been developed to provide PA HBAs with step-by-step guidance on the rules and regulations of NYSHIP, processing of transactions in New York Benefits Eligibility and Accounting System (NYBEAS), and the HBA's responsibilities.

[HBA Manual Demonstration Video](#)

# Recent HBA Memos

- [PA24-14 2025 Summary of Benefits and Coverage \(SBC\)](#)
- [PA24-12 Revised Forms PS-425 and PS-425.3 for Domestic Partner Enrollment](#)
- [PA24-10 2024 Mandated Notices: Creditable Coverage and CHIP](#)
- [PA24-09 NYBEAS Access and HBA Online Access](#)
- [PA24-07 Donate Life Registry Election Added to NYSHIP Health Insurance Transaction Form \(PS-503\)](#)

# HBA Help Line Staff

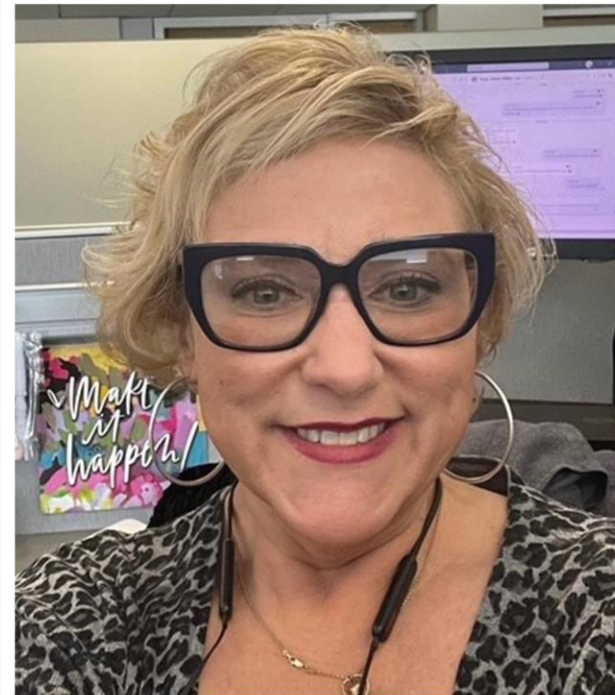
# Participating Agency & Participating Employer (PA/PE) Unit Staff

Amanda Perkins



Please have  
NYBEAS open and  
ready when you  
call the HBA Help  
Line.

Elizabeth Varsany



Please access the  
NEW HBA Manual.  
This is your toolbox  
for step-by-step  
NYBEAS  
transactions and  
much more!

# Participating Agency & Participating Employer (PA/PE) Unit Staff

Edward DerGurahian



Please have  
your agency  
code and the  
employee's SSN  
ready when you  
call the HBA  
Help Line.

Michael Santiago



When submitting  
a corrections  
request, please  
be sure to  
complete the  
'Corrections  
Request' and  
'Comments' tabs.



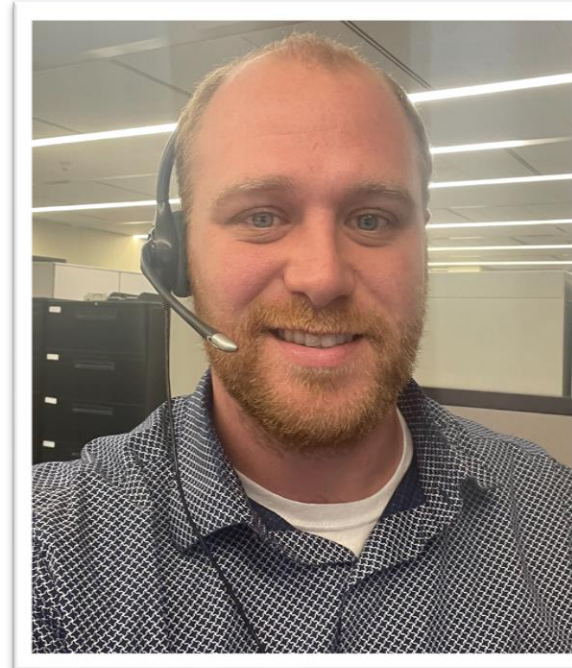
# Participating Agency & Participating Employer (PA/PE) Unit Staff

**Brendan Paulsen**



Please run your monthly reconciliation report on the Monday following the first Friday of each month to reconcile your bill.

**Michael Jones**



Please make sure you update your DAO and HBA information with EBD when you have staff changes!



**Questions?**



## **PELU Announcements**

**Presenter – Jesse Horton, Public Employer Liaison Unit**

# Topics

- **PELU Staff Introduction**
- **Excelsior Plan Discontinuation**
- **Policy Memo 127, Withdrawing Medicare Enrollees**
- **Timely processing**
- **Federal Premium Reporting**
- **Dual Family Prohibition & Buyout Programs**
- **When to Contact PELU**

# Public Employer Liaison Unit (PELU) Staff



**Amy Orr**

Use your NYSHIP resources: many answers to your questions can be found in the General Information Book, the HBA Manual, and the NYSHIP Administrative Guide.



**Susana Alvear**

Be sure to regularly check HBA Memos for important announcements.



**August Heinrich**

Remember to include your agency code in the subject line when you e-mail us.



**Jesse Horton**

Make sure to keep your NYBEAS credentials secure.

# **Excelsior Plan Discontinuation**

- **Effective January 1, 2025, the Excelsior Plan option will be discontinued for all NYSHIP Participating Agencies**
- **Agencies who currently offer the Excelsior Plan were notified of its discontinuation in early 2024**
- **All such agencies have elected to either move their Excelsior enrollees to the Empire Plan or withdraw them from NYSHIP**
- **All changes to current Excelsior agencies have been processed in NYBEAS effective Jan. 1**
- **Going forward, no requests to enroll in the Excelsior Plan will be accepted**

# Policy Memo 127

- As a reminder, agencies that participate in NYSHIP may not withdraw only their Medicare-eligible retirees from NYSHIP, in accordance with NYSHIP [Policy Memo 127](#).

# Policy Memo 127

- Some agencies have been offering non-NYSHIP Medicare Advantage Plans to their Medicare-primary enrollees. This is allowable only if Medicare-primary enrollees are given the choice to stay in NYSHIP.
- Enrollees and their covered dependents may not be enrolled in different plan options from one another.

# Policy Memo 127

- Participating Agencies are not allowed to withdraw only their Medicare-eligible enrollees from NYSHIP because this practice is detrimental to the plan
- As a reminder, the NYSHIP premium cost is significantly reduced for Medicare-primary members
- Any Participating Agency or Participating Employer that wishes to remove Medicare-primary retirees from eligibility for NYSHIP must withdraw all of its retirees from NYSHIP

# Timely Processing

- As reminder, it is extremely important that all changes to enrollment records are processed in NYBEAS in a timely manner
- Typically, changes should be processed within 7 days of the request or event
- Timely processing is required to ensure accurate billing and a smooth transition of benefits for enrollees
- Numerous problems can arise when transactions are not processed timely



# Timely Processing

- For example, when a retirement is not processed in time for a Medicare eligible enrollee, claims are incorrectly paid as plan-primary
- When EBD is eventually notified the employee has been retired, claims must be reversed
- Medicare has a limit on how far back they will pay claims, and will refuse claims submitted outside this time frame

# Timely Processing

- Reversed claims can be costly to the enrollee and the plan, and increased plan costs mean increased premiums for all plan enrollees
- In addition, agencies may incur additional premium costs if there is a difference in premium amount and transactions are processed outside the 6-month refund window

# Timely Processing

- As another example, problems can arise when job transactions, such as terminations or leaves of absence are not keyed on time
- Employees and their dependents may continue to have access to the benefits well after their eligibility has ended
- By the time the job record is corrected, claims may have already been paid and the costs cannot be recovered
- Once again, this can be costly to the plan, which is ultimately costly for plan enrollees and agencies

# **Mandatory Federal Premium Reporting**

- **The federal Consolidated Appropriations Act requires that all health insurance plans annually report the average monthly premium paid by employees and employers**
- **Plans, including NYSHIP, must report 2024 premium to the federal government by mid-2025**
- **As has been done in past years, agency HBAs will be required to submit employee and employer premium information for their agencies using the dedicated NYBEAS page**

# Mandatory Federal Premium Reporting

- Please monitor HBA Online for an official announcement
- We plan to release an HBA memo in early 2025 with deadlines and instructions for submitting your premium information
- Premium information will likely be due In March 2025
- **This is a mandatory federal requirement**

# Optional Dual Family Prohibition

- New York State prohibits dual family coverage for its employees through
  - Employees may not be enrolled in family coverage and as a dependent on another enrollee's NYSHIP policy
- This provision is included in the State's collective bargaining agreements with its public employee unions
- Participating Agencies may similarly prohibit their employees from being enrolled in dual family coverage to lower their overall health insurance costs

# Optional Buyout Programs

- New York State offers a health insurance buyout program to its employees
  - Employees can receive \$1,000 for opting out of individual coverage
  - Employees can receive \$3,000 for opting out of family coverage
- Participating Agencies may implement similar programs to lower their overall health insurance costs
- [Policy Memo 122r1](#) outlines the Department's policy on buyout programs for health insurance coverage

# When to Contact PELU

- Questions about NYSHIP policies
- Changes in NYSHIP benefits such as contribution rate changes, changes in service time requirements, or newly offering benefits to a class or category of employee/retiree
- Contact us 6 months prior to the effective date of the change
- Please contact PELU by e-mail at [PELU@cs.ny.gov](mailto:PELU@cs.ny.gov)





**Questions?**

# **Empire Plan Benefit Changes**

**Presenter- Erik Anderson, Contract Manager, Vendor Management Unit**

**New York State Department of Civil Service  
Employee Benefits Division**

**Prepared for use by the Department of Civil Service, Employee Benefits Division representatives only.**

# **Empire Plan Benefit Changes**

## **Topics**

- **What's New for January 1, 2025**
- **Benefit Updates and Reminders**

# Empire Plan Benefit Changes

## What's New for January 1, 2025

- **New Benefit ID Cards:**
  - Enrollees are in the process of receiving new Empire Plan Benefit ID cards to reflect the lower, negotiated In-Network Maximum Out-of-Pocket Limits (shown on next slide).
  - Groups not ratified at this time also are in the process of receiving new benefit cards with the updated In-Network Maximum Out-of-Pocket Limits per federal guidelines.
  - Empire Plan members can use these cards immediately; they do not have to make any phone calls or register their benefit ID card.

# Empire Plan Benefit Changes

## What's New for January 1, 2025

### Maximum Out-of-Pocket Limits:

2025 MOOP			
Coverage Type	Hospital/Medical/MHSU	Drug	Total
Individual	\$2,670	\$1,450	\$4,120
Family	\$5,350	\$2,890	\$8,240

# Empire Plan Benefit Changes

## Prescription Drug Benefit Updates

### **\$0 Copay on Insulin, Effective January 1, 2025:**

- Covered prescription insulin will be available at no copay.
- This change was part of the Enacted Budget.

### **\$0 Copay and No Prior Authorization on Medications Used for the Prevention of HIV (PrEP and PEP), Effective December 1, 2024:**

- Medications used for the prevention of HIV will be available at no cost and without the need for prior authorization.
- These changes were enacted in CH. 152, Laws of 2024 (No PA) and Ch. 180, Laws of 2024 (No Copay)

# Empire Plan Benefit Changes

## Prescription Drug Benefit Updates

### mPox Vaccine

- For adults ages 18 and older, the mPox (formerly “Monkeypox”) vaccine is covered at no cost when provided by a vaccination network pharmacy or participating medical provider.
- Find a pharmacy that is included in the vaccine network by going to [www.empireplanrxprogram.com](http://www.empireplanrxprogram.com). Select CVS Caremark and scroll down to the link for Find a Local Pharmacy. Under the Advanced Options menu, select Vaccine network.

# Empire Plan Benefit Changes

## Prescription Drug Coverage

### GLP-1s for Diabetes and GLP-1s for Weight-Loss

- The Empire Plan covers GLP-1s for diabetes (e.g., Ozempic, Mounjaro, Trulicity) and GLP-1s for weight-loss (e.g., Wegovy, Zepbound).
- GLP-1s are subject to Prior Authorization (PA) to ensure the products are used safely and effectively.
  - PAs on the GLP-1s for diabetes look for a diagnosis code of diabetes or that the member uses other diabetes treatment products
  - PAs on the GLP-1s for weight loss look for BMI requirements and individual participation in weight management programs, reduced calorie diet and increased physical activity.



# Empire Plan Benefit Changes

## Benefit Updates and Reminders

### Empire Plan Member Resources:

**LiveHealth Online** is a telehealth benefit that provides access to a board-certified doctor, psychiatrist, psychologist, and licensed therapist by telephone or a video visit on your smartphone, tablet or personal computer.

- \$0 copayment – service is at no cost to Empire Plan members.
- To register or to schedule a visit, go to [www.anthembluecross.com/nys](http://www.anthembluecross.com/nys) or call 1-888-LiveHealth (1-888-548-3432).
- Representatives are available 24/7.

# Empire Plan Benefit Changes

## Benefit Updates and Reminders

### Empire Plan Member Resources:

**Talkspace** provides online access to therapy with a licensed clinician.

- Members can text providers and set up video or telephone calls.
- Therapy is subject to a copay, similar to an in-person visit.
- To get started, you can go to <https://www.talkspace.com/empireplan>

# Empire Plan Benefit Changes

## Benefit Updates and Reminders

### Empire Plan Member Resources:

- **The Empire Plan NurseLine<sup>SM</sup>** is available 24/7. Registered nurses can answer health-related questions and assist in finding a network provider.
- **The Clinical Referral Line** for the Mental Health and Substance Use Disorder Program is available 24/7. Licensed clinicians can help find a provider and schedule an appointment if necessary.
- **CVS Caremark** representatives are available 24/7 to answer questions about prescription drug benefits and assist in finding a network pharmacy.
- **1-877-7-NYSHIP (1-877-769-7447)** is the number to call for the above services; this number is found on the back of the Empire Plan benefit ID card.



# Questions?

# **Financial Update**

**Presenter - Katelyn Wilder**  
**Director**  
**Office of Financial Administration**

**New York State Department of Civil Service**  
**Employee Benefits Division**

# 2025 Rate Renewal

- Empire Plan Net Premium increase: 0.8%
- Empire Plan Program Trends:
  - Hospital Program: 5.4%
  - Medical Program: 4.5%
  - Prescription Drug Program: 11.6%
  - Mental Health & Substance Use Program: 6.4%
- No Dividend Application

# 2025 Participating Agencies Monthly Net Rates

## **Empire PlanPrime**

- Individual \$1,479.53
- Family \$3,367.80

## • **Empire Mediprime**

- Individual \$551.85
- Family–1 \$1,820.56
- Family–2 \$1,511.55



# Questions?



# Final Questions and Answers



# End of Meeting

