



NYSHIP Onboarding Procedures for PAs and PEs

For employers interested in joining NYSHIP

EBD Units and Agency Types

When public employers request to join NYSHIP, outreach and onboarding is managed by the Employee Benefits Division (EBD). Public employers interact with three different units within EBD:

- Public Employer Liaison Unit (PELU)
- Participating Agencies and Participating Employers (PA/PE) Unit, which is a unit within the Program Administration Unit (PAU)
- Communications Unit

NYSHIP Participating Agencies (PAs) are local or municipal entities such as counties, cities, towns, villages, school districts, fire departments and libraries located throughout New York State.

NYSHIP Participating Employers (PEs) are quasi-state agencies maintained and financed by special administrative funds, such as the Thruway Authority or Metropolitan Transportation Authority.

PEs interested in joining NYSHIP must provide documentation that they were created or authorized by a governmental body, receive at least 50% of their funding from government sources, and provide a government function to be eligible to participate.

Onboarding Process

PELU is the initial point of contact and works with the employer to determine the agency's eligibility to join NYSHIP as a PA or PE and sends the employer information about NYSHIP benefits, NYSHIP administration and rates.

If the agency decides to proceed, PELU sends the following onboarding materials:

- *Resolution Electing Participation in NYSHIP Form* (PS-500)
- *NYSHIP Participation Agreement* (PA or PE)
- *HBA Confidentiality Agreement*
- [Data Access Officer Request Form \(EBD-545\)](#)
- [NYSHIP Health Insurance Transaction Form for PAs \(PS503\)](#)
- [NYSHIP Health Insurance Transaction Form for NYS & PEs \(PS404\)](#)

PELU helps the agency determine a proposed enrollment date. Per [Policy Memo 150](#), EBD requests six months' advance notice to onboard a new agency.

Application Review

After the agency submits the completed forms, PELU conducts its review, assigns an agency code, and sends a memo to the EBD director with its recommendation to approve or decline the enrollment.

If approved, the EBD Director's office sends a letter to the agency's president, CEO, executive director, or district manager, etc. welcoming them to NYSHIP, confirming the enrollment date, and detailing the next steps.

Establishing a DAO and HBA

The new PA or PE must designate a health benefits administrator (HBA) and data access officer (DAO) to serve as liaisons to NYSHIP and record their names on the *Resolution Electing Participation in NYSHIP Form* (PS-500). A [Data Access Officer Request Form \(EBD-545\)](#) must also be completed. The HBA and DAO cannot be the same person.

HBAs are employees of the agency responsible for updating an enrollee's NYSHIP benefit information using the online New York Benefits and Eligibility Accounting System (NYBEAS) portal. HBAs must sign a confidentiality agreement and follow guidelines concerning protected health information.

DAOs are employees of the agency who request permission for HBAs to access NYBEAS and the [HBA Online](#) website through Civil Service Online Permission Request (OCSPR). They also remove permission for HBAs who leave the agency or no longer have a use for the permissions.

NYBEAS is where NYSHIP enrollee information is maintained and can be viewed or changed as necessary. [HBA Online](#) is a resource that contains NYSHIP information, HBA training resources, publications, memos, and benefits announcements.

DAO and HBA Permissions

After the completed [Data Access Officer Request Form \(EBD-545\)](#) has been received, EBD activates and assigns permissions to the DAO enabling them to access OCSPR and request access to NYBEAS and [HBA Online](#) for new HBAs.

The OCSPR system is located on the Civil Service Website at: "HR Professionals" > "State Government" > "User Permission Request."

PAU and Information Technology Services (ITS) send instructions to the DAOs and HBAs respectively to create NY.GOV ID accounts to access various New York State online resources.

After the DAO has requested HBA access and permissions is approved, PA/PE provides HBAs with NYBEAS and enrollment training resources 1-2 months before the coverage effective date using a "tell, show, do" process:

- Tell – PA/PE explains the enrollment process and how to navigate HBA Online.
- Show – the PA/PE Unit shows how to processes some enrollments
- Do – the HBA processes some enrollments themselves

For agencies with more than 300 enrollees, PAU coordinates with ITS to process the initial enrollment for the new PA or PE. If they have fewer than 300 enrollees, the HBA is responsible for manually processing enrollments, with PAU providing NYBEAS assistance as needed.

In all cases, future enrollments and health benefits transactions in NYBEAS are the HBA's responsibility.

Communications

Once the HBA is established, Communications sends them a welcome email with PDFs of NYSHIP publications to help new enrollees understand how to use their health coverage.

- PAs are sent:
 - [At a Glance](#) publication for PAs
 - [General Information Book](#) for PAs
 - [Empire Plan Report](#) for PAs

- [The Empire Plan Across the United States](#)
- [The Empire Plan Worldwide](#)
- PEs are sent:
 - [At a Glance](#) publication for PEs
 - [General Information Book](#) for PEs
 - [Empire Plan Report](#) for PEs
 - [The Empire Plan Across the United States](#)
 - [The Empire Plan Worldwide](#)

The email also provides HBAs with instructions for downloading updated PDFs and ordering printed copies for employees on [HBA Online](#).

Communications explains to the HBA how to subscribe to the monthly HBA email newsletter, which notifies HBAs of new or updated publications, HBA memos, and other updates. NYSHIP regularly updates publications, including:

Publication	Frequency	Time of year
<i>At A Glance</i>	Annually	January
<i>IRMAA Notice & Application (retirees only)</i>	Annually	January
<i>Empire Plan Report</i>	Annually	May
<i>Empire Plan Preventive Care Coverage Guide</i>	Annually	Varies
65th Birthday Letters re: Medicare enrollment	Sent five months prior to enrollee's 65 th birthday	Varies
<i>General Information Book</i>	Every two to three years	Varies
<i>Empire Plan Certificates and Amendments</i>	Varies per group, year	Varies