



Office of General Services  
**Business Services Center**

# **Onboarding Liaison Workshop:** **Onboarding Information Packets**

September 18, 2019

# Onboarding Worklist from HCM



# Types of HCM templates received and reviewed

Agency liaisons submit one of the below HCM templates based upon the specifics of the transaction:

- NYS\_CROSS\_AGENCY
- NYS\_ENCUM\_HIRE
- NYS\_ENCUM\_HOLD (received separately)
- NYS\_HIR\_REH\_CNCHIR
- NYS\_INTAG\_TRSNFR
- NYS\_JOB\_DATA\_INCUM



# Importance of timely, accurate HCM templates

## Agency role:

The agency liaison should submit complete and accurate HCM templates at least two full business days prior to the employees' effective date to ensure employees receive their onboarding packets timely.

## BSC role:

The BSC will review the HCM templates the day after the agency submits them and will determine if an onboarding packet is required. Within two full business days, the BSC will create and send the onboarding packet to the agency liaison.



# HCM alert email: accuracy review

## Daily Worklist NY\_BENEFITS\_WORKLIST

The BSC receives a spreadsheet of the previously-identified templates daily. We review the spreadsheet for any discrepancies in the benefit flag/eligible for health insurance fields before uploading.

**Report**

Report ID 350467      Process Instance 415388      [Message Log](#)

Name PSQUERY      Process Type Application Engine

Run Status Success

BENEFITS\_WORKLIST

**Distribution Details**

Distribution Node SOLARIS      Expiration Date 09/15/2019

**File List**

Name	File Size (bytes)	Datetime Created
AE_PSQUERY_415388.stdout	289	08/01/2019 12:11:04.228199AM EDT
NY_BENEFITS_WORKLIST-415388.xlsx	13,801	08/01/2019 12:11:04.228199AM EDT

**Distribute To**

Distribution ID Type	*Distribution ID
Role	NYHCM_BSC_BENEFITS_ONBDG_RPTS

AutoSave (6) NY\_BENEFITS\_WORKLIST-431648 (1) - Excel

File Home Insert Page Layout Formulas Data Review View Help Tell me what you want to do

Clipboard Font Alignment Number

Normal Bad Good Neutral

A1 New hire templates submitted

Sequence	Template ID	State Service Info	Agency Code	Date Submitted	Effective Date	Fiscal Year	Projected Pay Period
1	New hire temp	23					
2	Submit Date = 1900-01-01						
3	207332 NYS_ENCUM_HIR	New State employee	14010	9/10/2019	9/19/2019	2019	13
4	207612 NYS_ENCUM_HIR	New State employee	14010	9/10/2019	9/19/2019	2019	13
5	207658 NYS_HIR_REH_CNCHI	Current NYS emp (other agency)	21065	9/10/2019	9/19/2019	2019	13
6	207669 NYS_INTAG_TRNSFR	Current Agency employee	01050	9/10/2019	9/19/2019	2019	13
7	207686 NYS_HIR_REH_CNCHI	New State employee	01110	9/10/2019	9/19/2019	2019	13
8	207694 NYS_ENCUM_HIR	Current NYS emp (other agency)	14010	9/10/2019	9/10/2019	2019	12
9	207696 NYS_ENCUM_HIR	Previous State service	12000	9/10/2019	9/11/2019	2019	12
10							
11	207701 NYS_ENCUM_HIR	Previous State service	01110	9/10/2019	9/3/2019	2019	12
12	207704 NYS_JOB_DATA_INCIUM		01300	9/10/2019	9/10/2019	2019	12
13	207710 NYS_CROSS_AGENCY	Current NYS emp (other agency)	12200	9/10/2019	9/5/2019	2019	12
14	207722 NYS_INTAG_TRNSFR	Current Agency employee	12000	9/10/2019	9/5/2019	2019	12



# Review and identify templates

Microsoft Access interface showing the 'qry\_Onboarding\_Type\_Review' query. The form contains the following fields:

- Template Comments
- Onboarding Transaction Type (dropdown) / Negotiating Unit
- State Service Info / Previous NU (dropdown)
- Agency Code / Benefit Flag
- Effective Date / Benefit Flag Descr
- Hold End Date
- Leave End Date / Former Agency Code
- Last Name / SSN
- First Name / Assigned To (dropdown)
- Template ID
- Onboarding Comments
- N # / Grade
- Appt Level Title Code Desc / Position Title



# Onboarding packet transaction types

The BSC reviews the templates and manually selects the transaction type based on the history, if any, available in our HR systems:

- New State employee
- Cross agency transfer NU change
- Cross agency transfer no NU change
- Internal agency transfer NU change
- Return to hold
- Returning seasonal
- Returning retiree
- Benefits eligibility change (same agency, becoming benefits eligible)



# Onboarding Packet Process





# Creating the onboarding packets

The BSC identifies the transaction types for each template and stores it in our database.

- A supervisor identifies the template to determine the transaction type.
- An onboarding representative creates the packet accordingly.
- A supervisor reviews the packet for accuracy and emails each individual packet in zip-file format to the identified onboarding liaisons.



Employee Checklist

Employee Name, Start Date, Agency, Agency Code, Employee ID #, Negotiating Unit, Title, Select Negotiating Unit

This checklist is provided to you as a new or transfer employee. You have also been provided with an Employee Enrollment Deadlines & Insurance Effective Date form. This form is customized to your start date and shows your personal deadlines for submitting Section 1 forms below.

- Section 1: FORMS FOR ALL EMPLOYEES
Employment Eligibility Verification Form I-9
Death of Office Statement or Death of Office Statement for Appointed Officers
NYS Retirement Article 15 Membership Registration Application PS-5420
Designation of Beneficiary With Contingent Beneficiaries PS-5127
Retirement System Declaration Form for Optional Employees
IT-2104: New York State Withholding Certificate
IT-2104I Non-Resident and Allocation of Withholding Form
NJ-4 Federal Withholding Certificate
Deposit Deposit Form (AC-2772)
Member's NYSP Self-Identification of Employee Disability Status

- Section 2: BENEFITS ENROLLMENT INFORMATION
Employee Enrollment Deadlines & Insurance Effective Date Form (provided separately)
PS-404 Health Insurance Transition Form
PS-409 Employee Benefits Election Opt-Out Form
PS-428 Domestic Partnership Enrollment Application and Affidavit
New York State Health Insurance Program NYSHIP Online
Guide to Navigating NYSHIP Online
NYSHIP Health Insurance Choices for 2019
NYSHIP Health Insurance Choices for 2019 Supplement
NYSHIP 2019 Rates & Deadlines
NYSP Civil Service NYSHIP Memos for Benefits Eligible Employees of NYSP

Continued

ANDREW M. CUOMO Governor ROANN M. DESTITO Commissioner

August 1, 2019

Dear,

Congratulations on your new position, and on becoming a customer of the New York State Office of General Services (OGS) Business Services Center (BSC).

The BSC was established as New York State's central office for processing Human Resources (HR) and Finance transactions on behalf of New York State agencies. As a customer of the BSC we provide you with specific human resource services: including payroll administration, benefits administration, time and attendance, and maintenance of employee records.

As a new employee, there are many forms that need to be processed and benefits information in your file. Included with this welcome letter is a checklist that identifies and provides links to all forms that need to be completed by you and returned to the BSC for processing. Forms that need to be completed and returned to the BSC are identified with an "X" on your checklist. In addition, the checklist contains links to information regarding your benefits and additional programs you may be eligible for. Your checklist also contains a link to the "New Employee Guide to Filling Out Form I-9 and Understanding Benefits." This guide is a helpful tool in understanding the benefits available to you as a New York State employee, how to complete your paperwork, and the optional programs that you may wish to enroll in.

In addition to the checklist and the Guide, included with this letter is an Employee Enrollment Deadlines and Insurance Effective Date Form. Please pay particular attention to this form as it contains the deadlines and supporting documentation by the dates outlined in this document. Failure to complete and return this form and supporting documentation by the dates identified will result in a delay in your benefits being processed.

Please pay particular attention to the I-9 form that is included on your checklist. This is a federal form that must be completed by you and then a representative from your agency must complete it. You will need to bring your identification documents and complete Section 2 on the form. The form is returned to the BSC along with copies of acceptable documentation as soon as possible. If you have already completed an I-9 form and submitted it to you, you do not need to complete another.

You can find additional resources at our website located at https://bsc.ogs.ny.gov. You can also find additional resources at our website located at https://bsc.ogs.ny.gov. Documents to:

NYSP Office of General Services Business Services Center, Human Resources 220 Washington Avenue, 5th Floor, New York State Campus Building #5 Harriman State Campus, Albany, New York 12226 Attention: Benefits Administration Unit

If you need any further assistance, please do not hesitate to contact the Business Services Center at 518-457-4272 and we will be happy to assist you.

CSEA Employee Enrollment Deadlines and Insurance Effective Date Form

Employee Name:
Start Date:
Effective Date for:
Health Insurance: 42 Day Waiting Period
Dental Insurance: 28 Day Waiting Period
Vision Insurance: 28 Day Waiting Period

\*Earliest potential effective dates are listed above. Enrollment forms and supporting documentation must be submitted prior to these effective dates in order for enrollment to be effective on the dates listed above. For health insurance, enrollment after the date indicated above will result in a 3 pay-period waiting period before coverage becomes effective and you will not be eligible to participate in the pre-tax contribution period for the current calendar year.

The Opt-out Program

To participate in the Opt-out Program and receive Opt-out incentive payments, a completed PS-404 Health Insurance Transition Form, a completed PS- 409 Opt-out Program Attestation Form, and all required documentation must be received by the BSC Benefits Unit by the first date of eligibility (42 Day Waiting Period). Requests to enroll in the Opt-out Program made after the first date of eligibility will not be honored. Furthermore, eligibility for Opt-out in subsequent years may also be impacted.

If you do not indicate a Pre-Tax Contribution Program (PTCP) election status on your PS-404 at the time you elect the Opt-out Program, your PTCP election status will be defaulted to after-tax in accordance with New York State Department of Civil Service guidelines. Please be aware that if you enroll in health insurance coverage at a later date, your health insurance deductions will be after-tax. Changes to your PTCP election can only be made during the PTCP Election Period which runs from November 1 through November 30 annually.

Additional Deadlines:

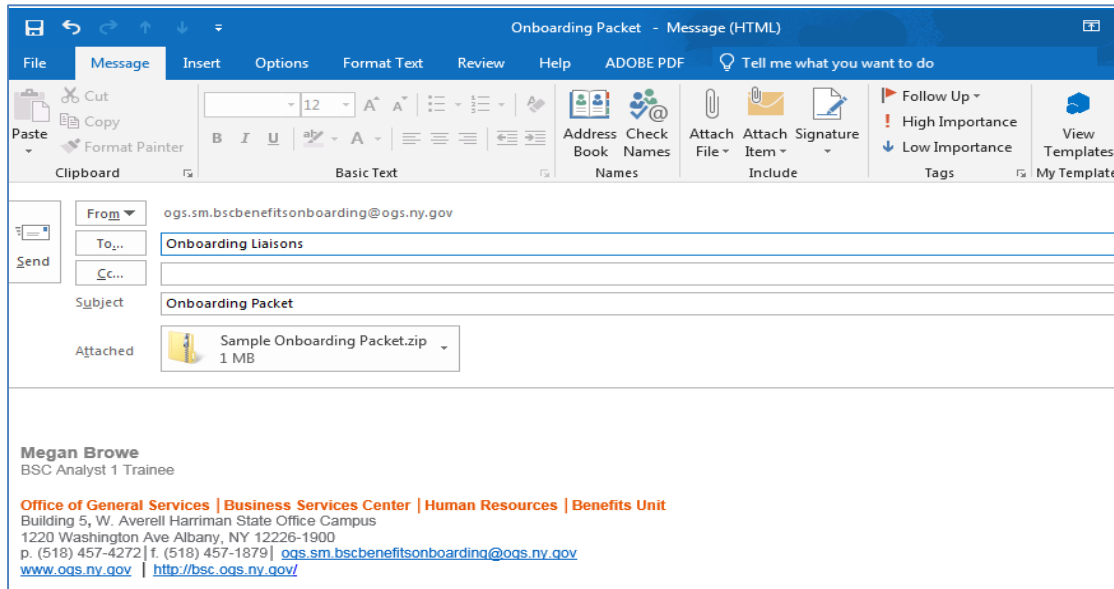
Employment Eligibility Verification Form - I-9: Within 3 days of start date (including copies of supporting documentation).

RS-5420 Employees Retirement System Enrollment: Within 7 days of Start Date. Failure to submit the completed form timely may result in arrears. This form does not need to be notarized.

Questions regarding Benefits may be directed to the BSC Benefits Unit at BSCBenefitsAdmin@ogs.ny.gov or 518-457-4272.

# Sending out onboarding packets

- BSC representatives record the packet creation in the database.
- A BSC supervisor reviews the packet for accuracy and emails each individual packet in zip-file format to the identified onboarding liaisons.



# Receiving and distributing onboarding packets

- Agency onboarding liaisons receive an email with an attached zip-file packet for each employee.
- Liaisons should review each packet for accuracy before distributing to the employee for completion.
- Review each packet for errors or changes.
  - For example: The employee's effective date may have changed after HCM template submission.
  - For additional examples and guidance, refer to the agency liaison packet review guidelines.



# Tracking & Processing Onboarding Forms



# Tracking incoming forms in onboarding access database

- The BSC stores all received forms in our FileNet electronic system for review.
- Onboarding records all forms with the status and date in our database.
- Benefits onboarding tracks the I-9, Oath of Office, RS-5420, PS-404 and MC life forms only.

Q2 2019 Database : Database- C:\Users\Browem\Desktop\Q2 2019 Database.accdb (Access 2007 - 2016 file format) - Access Browe, Megan E (OGS)

File Home Create External Data Database Tools Help Tell me what you want to do

Filter Ascending Selection New Save Spelling Find Replace Go To Select

Sort & Filter Records Find Text Formatting

All Access Obj... Search...

- qry\_Append\_PS-404\_Docs
- qry\_Append\_Retirement
- qry\_Append\_Worklist
- Copy Of qry\_Onboardi...
- Copy Of qry\_Onboardi...
- Find duplicates for tbl...
- qry\_21\_Day\_Missing\_Do...
- qry\_404-test
- qry\_All
- qry\_BSC\_Onboarding\_...
- qry\_Deadlines
- qry\_E\_Hold Review
- qry\_followup
- qry\_IAG\_Review
- qry\_lppshared
- qry\_lppshared\_worklist
- qry\_Needs\_Forced\_Retr...
- qry\_Onboarding\_Data
- qry\_Onboarding\_Data\_...
- qry\_Onboarding\_Not\_N...
- qry\_Onboarding\_rpts
- qry\_Onboarding\_to\_se...
- qry\_Onboarding\_Tracki...
- qry\_Onboarding\_Tracki...
- qry\_Onboarding\_Tracki...
- qry\_Onboarding\_Type\_...
- qry\_Outstanding\_Docs\_...
- qry\_Subforms\_Transfer\_...
- qry\_Subforms\_Transfer\_...

Forms

- frm\_E\_Hold Review
- frm\_HCM\_Transactions
- frm\_IAG\_Review

frm\_Switchboard | frm\_Onboarding\_Tracking | frm\_Onboarding\_Tracking\_Closed | qry\_Onboarding\_Tracking\_Form | frm\_Onboarding\_Type\_Review

Agency Code [ ] Emplid [ ] SSN [ ]

Last Name [ ] First Name [ ]

Effective Date [ ] Date Submitted [ ] Pay Period [ ]

Leave End Date [ ] Hold End Date [ ]

Division Descr [ ] Bureau Descr [ ] Section Descr [ ]

Position Title [ ] Appt Level Title Desc [ ] Appt Level Title Change [ ] Position L [ ]

Template Type [ ] State Service Info [ ] Salary Grade [ ]

Appointment Status [ ] Negotiating Unit [ ] Former Agency Code [ ]

Work % [ ] 211-212 [ ] Previous NU [ ]

Template Comments

[ ] HCM Sequence Number [ ]

Onboarding Transaction Type [ ] Entered on Log By [ ] Eligible for Health Insurance [ ]

VDC Eligible  Benefit Flag Descr [ ] Eligibility Date Value [ ]

Onboarding Comments

[ ]

Onboarding Status **I-9** Retirement PS-404 Oath MC Life

Onboarding Sent  Onboarding Sent By [ ] Assigned To [ ]

Date Onboarding Sent [ ]

Onboarding Complete  Date Onboarding Complete [ ]

Follow-up Sent [ ] Date Follow-up Sent [ ]

Medical Deadline [ ] Vision Deadline [ ] Dental Deadline [ ]

Hold For Agency Review  Agency Hold Date [ ] Hold Date Removed [ ]

Record: 14 of 702 of 702 Unfiltered Search

Form View Num Lock

# Close-out onboarding process

## Follow-up emails:

- The BSC sends standard language follow-up emails to employees notifying them of the status of forms received.
- If the forms are missing information, the BSC sends a follow-up email to the employee and includes:
  - any deadlines applicable to the forms requested
  - options for sending in the requested forms
- Once the BSC receives all required forms and optional forms deadlines have passed, we will send an email notifying the employee of optional benefits still available to them. At this time, the BSC will close the case.



# Bi-weekly reports of outstanding cases

The BSC generates a bi-weekly report for each agency for outstanding cases.

- The BSC emails the report to the onboarding liaisons and includes all employees with outstanding information or forms.
- Forms sent to the BSC within 10 business days may still be in transit to the benefits FileNet system for review.

# Contact us

## Benefits onboarding contact information:

- Email: [OGS.sm.BSCBenefitsOnboarding@ogs.ny.gov](mailto:OGS.sm.BSCBenefitsOnboarding@ogs.ny.gov)
- Phone: 518-457-4272
- Fax: 518-457-1879
- Mailing address:  
BSC Benefits Unit  
1220 Washington Ave. Bldg 5, Fl #6  
Albany, NY 12226-1900

# Questions?