



Benefits Administration - Operating Agreement

BSC		Agency	
Key Performance Indicator	Target	Key Performance Indicator	Target
Send onboarding packets to Agency onboarding liaison within 2 business days of receipt of complete, accurate HCM template	97%	Submit complete, accurate templates to the BSC before the effective date of hire/transfer	85%
		Return complete, accurate onboarding forms to the BSC prior to expiration of the health insurance waiting period	85%
Send offboarding packet to employee within 7 days of notification for non-retirement employee separations	90%	Notify the BSC of employee non-retirement separations within 7 days of the effective date	90%
Send offboarding packet to employee at least 7 days prior to their retirement effective date	90%	Notify the BSC of employee retirement 14 days prior to effective date	90%

Operating Responsibility	Agency Administers Leaves		BSC Administers Leaves	
	Agency	BSC	Agency	BSC
Review HCM daily to determine onboarding packets that need to be sent, including those needed due to a change in an employee's benefits.		X		X
Distribute onboarding packets to the Agency onboarding liaison.		X		X
Track employee completion of orientation/onboarding paperwork and provide bi-weekly report on missing paperwork to Agency onboarding liaison.		X		X
Review bi-weekly report on missing paperwork and follow-up with employees.	X		X	
Follow-up with employees to obtain missing I-9 or Oath of Office forms.	X	X	X	X
Follow-up with employees to obtain missing or incomplete forms. Provide information on how to submit the forms and the deadlines by which to submit them.		X		X
Provide benefits information to new employees, retiring employees, employees separating from State service, and employees whose new State position is represented by a different negotiating unit.		X		X
Perform onboarding and orientation training related to specific Agency policies, procedures, and standards.	X		X	
Process statewide employee-related onboarding paperwork after receipt of completed forms.		X		X

Distribute employee documentation appropriate to New York State agencies as needed (e.g., Department of State Public Officers Oath).		X		X
Process retiree health insurance forms and submit appropriate paperwork to DCS upon employee retirement.		X		X
Consult with employees and project accrual run-out for employees nearing retirement.		X		X
Send employee appointment letters, notifications and/or commitment letters, off-boarding letters, and discretionary leave approval/denial letters.	X		X	
Provide benefits-related guidance for employees who are going on a leave of absence for discretionary leave or a disciplinary leave/suspension.		X		X
Maintain employees' health insurance files.		X		X
Work with DCS and/or insurance providers as needed to assist employees in resolving benefits-related issues.		X		X
Review forms for accuracy and completeness and work with employees to correct errors before processing benefits-related changes.		X		X
Post announcements on the BSC website and notify agency liaisons of benefit programs, program changes, and open enrollment periods.		X		X
Process employee benefit enrollments and changes in NYBEAS.		X		X
Coordinate employee-related benefit matters when they involve labor relations, supervisors, and other key Agency stakeholders.	X		X	
Process health insurance changes, pre-tax contribution changes, and opt-out transactions.		X		X
Process National Medical Support Orders.		X		X
Process Productivity Enhancement Program ("PEP") transactions in NYBEAS.		X		X
Initiate HCM and LATS-NY transactions related to employee medical leaves.	X			X
Communicate information about leave status change, such as an expected return to work date, or any other relevant information with appropriate individuals within the Agency.	X			X
Maintain employees' medical and Workers' Compensation files.	X			X
Process Workers' Compensation incidents in NYBEAS ARS.	X			X
Run Workers' Compensation SH-900 reports.	X			X
Prepare SH-900.1 and US DOL on-line accident and injury survey.	X			X
Communicate medical/Workers' Compensation leave information within the agency as appropriate and consistent with agency/policy/procedures.	X		X	
Authorize Civil Service Law Section 71, 72, and 73 proceedings.	X		X	
Distribute FMLA guidelines and paperwork to employees who are eligible for FMLA.	X			X
Run FMLA qualifications report in LATS-NY to determine employee hours worked in past year.	X			X
Make determinations regarding employee FMLA eligibility.	X			X
Make FMLA determination after medical certification form is received from the employee's physician.	X			X
Set up FMLA case in LATS-NY.	X			X
Run FMLA qualification report in LATS-NY to determine employee hours worked in past year.	X			X
Monitor and track employee FMLA usage.	X			X

Set up Workers' Compensation cases in LATS-NY for employee Workers' Compensation incidents.	X			X
Consult with employees to project accrual run out for employees preparing for maternity/childcare leave.	X			X
Provide guidance to employees regarding leave options in accordance with regulations and collective bargaining agreements.	X			X
Communicate with employees on leave regarding required status changes (e.g. change to sick leave at half-pay).	X			X
Monitor, complete, and submit timesheets for supervisor approval for employees who are on child care leave, FMLA, Workers' Compensation leave, military leave, sick leave at half pay, and/or sick leave with or without pay	X			X
Provide bi-weekly report of employees' medical/workers' compensation leave status to HR liaison.	n/a	n/a		X
Review bi-weekly report of employees' medical/workers' compensation leave status to HR liaison.	n/a	n/a	X	