

Tribal Insurance Processing System (TIPS) 101 Training

Welcome and Introductions

TIPS HOLDARD

- Welcome
- Introductions
- Restrooms
- Parking Lot
- Review Learner Materials





Lesson / Activity	Duration
Lesson 1: FEHB Overview	30 minutes
Lesson 2: TIPS and Enrollments	45 minutes
Break	10 minutes
Lesson 3: Billing and TIPS Reports	45 minutes
Morning Review	20 minutes
Lunch	60 minutes
Lesson 4: Special Transactions	30 minutes
Lesson 5: Performing Transactions in TIPS	90 minutes
Break	10 minutes
Lesson 6: Obtaining Additional Assistance	30 minutes
TIPS Transactions References	10 minutes
Final Review and Evaluation	35 minutes

Ground Rules



During class, please do:

- \blacksquare Ask questions
- ✓ Participate
- ✓ Take notes and mark pages in your participant guide
- ✓ Turn off or silence your cell phone

During class, please do not:

- ☑ Text during class
- Use email or the internet except during breaks
- ☑ Have side conversations





We'd like each Tribal Employer team to:

- Introduce your organization
 - Name of organization
 - Members of team
 - Mission of organization
 - Number of employees
- Ask any questions you might have going into today



- By the end of this course, you should be able to:
 - Describe the FEHB key stakeholders relative to TIPS
 - Identify how TIPS supports Tribal Employers
 - Explain the employee enrollment process
 - Explain the billing and payment processes
 - Enroll employees in TIPS using individual forms and Electronic Uploads
 - Run and review TIPS Reports and Billing Reports in TIPS
 - Describe special transactions including: Billing Unit/POI Transfers, Retroactive Adjustments, and Court Orders
 - Demonstrate how to navigate the TIPS website
 - Submit an inquiry using the Remedy Requester Console

Lesson 1: FEHB Overview



Lesson 1: FEHB Overview	30 minutes
Lesson 2: TIPS and Enrollments	45 minutes
Break	10 minutes
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Lesson 1 Objectives



- By the end of this lesson, you should be able to:
 - Describe the FEHB program
 - Identify the legislation that extends FEHB to Indian Tribes, Tribal Organizations, and Urban Indian Organizations
 - Identify who is eligible for FEHB
 - List the key stakeholders in FEHB relative to TIPS
 - Explain how FEHB key stakeholders interact with each other
 - Describe how Tribal Employers join FEHB and the FEHB Tribal Agreement Package



- The U.S. Department of Agriculture's (USDA) NFC is located in New Orleans, Louisiana
- NFC's mission is to provide reliable, cost-effective, employee-centric systems and services to Federal organizations, thus allowing its customers to focus on serving the Nation
- NFC provides administrative payments, payroll/personnel processing, and accounting services to over 170 Federal organizations



FEHB Overview: FEHB and Tribal Employer Participation





- Provides employer-sponsored health insurance to Federal employees
- Administered by the Office of Personnel Management (OPM)

How did Tribal Employers become eligible for FEHB?

- On March 23, 2010, President Barack
 Obama signed the Patient Protection and Affordable Care Act (PPACA)
- PPACA extends FEHB to eligible Tribes, Tribal Organizations, and Urban Indian Organizations

FEHB Key Stakeholders: Overview





Employees

FEHB Key Stakeholders: Tribal Employees





Tribal Employees

Tribal Employees should work with their Tribal Employers to:

- Select plans and submit enrollment requests
- Submit plan change requests
- Submit change of personal data requests
- Cancel enrollment

Contact Tribal Employer or FEHB Plan Carriers with specific inquiries

FEHB Key Stakeholders: Tribal Employers





Tribal Employers

- Elect to participate and complete initial enrollment forms
- Identify eligible Tribal employees
- Validate Tribal employee enrollment and plan change requests
- Enter enrollments and plan changes into TIPS
- Address Tribal employee inquiries
- Establish payment account for pre-authorized debits and fund account monthly
- Submit billing, standard form processing, technical, or system related inquiries
- Work with NFC to facilitate enrollment reconciliations

FEHB Key Stakeholders: National Finance Center





NFC

- Maintain TIPS and provide TIPS training
- Collect preauthorized debit payments from Tribal Employers
- Reconcile administrative and financial adjustments with Tribal Employers
- House enrollment data
- Reconcile enrollments with FEHB Plan Carriers
- Provide TIPS inquiry support to Tribal Employers

FEHB Key Stakeholders: Office of Personnel Management





OPM

- Administer FEHB
- Negotiate FEHB benefits and rates with FEHB Plan Carriers
- Develop FEHB policy
- Provide FEHB training
- Address FEHB policy questions
- Terminate Tribal Employer Billing Unit/POIs

FEHB Key Stakeholders: FEHB Plan Carriers





FEHB Plan Carrier(s)

- Provide plan information and documentation, including health insurance card
- Address Tribal employee inquiries about coverage and claims
- Provide health insurance coverage to Tribal employees
- Process claims
- Work with NFC to reconcile enrollments using the Centralized Enrollment Clearinghouse System (CLER)

Joining FEHB



 In order to join the FEHB program, the following five steps need to be completed in order to access TIPS and be enrolled into FEHB:



FEHB Agreement Package

- Tribal Employer must complete and return the documents OPM sent, including:
 - Agreement to Purchase FEHB
 - Tribal Employer Profile
 - DPRS Memorandum of Understanding (MOU)
 - Bank Account Information Form
 - Authorized Contact Designation
 Forms (description of each listed below)

		FY 2012
	Memorandum of Unde	erstanding
	Direct Premium Ker	mittance
	Jystem	
		<u> </u>
	DRAFT Tribal FEHB Handbook Last Updated 2/2/12	
	Note: Not all Indian tribes, tribal organizations, and urban Indian organizations have chosen to participate in the FEHB Program. A tribal employee should contact his or her	
	under the FEHR Program.	
	Tribal	
	Federal Employees Health Benefits	
	(FEHB) Handbook	
		ates Department of Agric Finance Center
Federal Emple	aver Health Parafite Program	
TRIBAL	EMPLOYER PROFILE	
Tribal Employer:		
Check one: [] tribe [] tribal organization (attach tribal r.	and a start of the	
[] urban Indian organization (attach Directors, tribal affiliation of each I	NANSANGUS) letter and a list showing the name: of Board of Soard member, and state whether the Board member resides within	
Check one:		
[] ISDEAA Contract No [] ISDEAA Funding agreement for (c. [] ISDEAA Compact		
[] IHCIA Title V Contract No [] IHCIA Title V Grant No [] other ISDEAA or IHCIA Title V do	for (colendar fiscal) year(s) (stack cop) for project period (stack cop) scurest.(stylizing and stack documentation):	
Month'year in which FEHB coverage a	n I be effective:	
Number of tribal employees eligible for	(TEHB:	
Do you have access to me internet? Do you have the ability to electronically	y process enrollment elections and changes. [http://jno	
Tribal Benefits Officer (OPM's sole po Name:	int of contact with tribal employer):	
Mailing address:		



Tribal Employer Leadership Contacts

• As a part of the OPM Agreement Package, Tribal Employers must inform OPM and NFC of these contacts:

Tribal Chief Executive Officer (CEO)

- 1 per Tribal Employer
- The highest-ranking Tribal officer (executive) or administrator in charge of total management of a Tribal Employer
- The person who signed the Agreement with OPM
- Can approve Tribal Benefits Officer (TBO) and TSO

Tribal Chief Financial Officer (CFO)

- 1 per Tribal Employer
- A Tribal officer primarily responsible for managing the financial transactions of the Tribal Employer
- Can approve TBO and TSO roles



Tribal Employer TIPS Contacts



• As a part of the OPM Agreement Package, Tribal Employers must designate three specific contacts:

Tribal Benefits Officer (TBO)

- 1 per Tribal Employer
- Serves as the Authorized Contact for Tribal Employees, OPM, NFC, and FEHB Plan Carriers
- Is contacted in case of non-payment of premiums

Tribal Security Officer (TSO)

- 1 primary and a minimum of 1 secondary
- Works with NFC to establish TIPS user identifications for the Tribal Employer
- Resets locked out Tribal Employer's TIPS user passwords

Authorized Maintenance Contact

• 2 per Tribal Employer

•

Adds and updates contact information in TIPS for a Tribal Employer's Authorized Contacts

*One individual can fill multiple roles

OPM Agreement Package Verified

- NFC and OPM will work together to verify completion of your Tribal Employer's agreement package
- A NFC Customer Management Branch representative will contact your TBO with the required steps to establish your Tribal Employer's Authorized Maintenance Contact(s)





TIPS Security Officer Training



- An NFC security representative will contact the newly designated TSO(s) to arrange security training
- Security training is required for all TSO(s)
- TSO training covers:
 - NFC's Access Management Branch responsibilities
 - TIPS Security Officer responsibilities
 - Samples of security access requests
 - Opening a Remedy (inquiry) ticket

TIPS User ID Establishment



- After TSO(s) have received security training, they must submit User ID requests to NFC for individuals who will access TIPS
- TSO(s) may assign one of the following roles:

Role	Description	TIPS Access
Update/Tribe	Standard Tribal Employer user	Can create/update enrollee SF 2809s and SF 2810s
(e.g. Human		 Can view/download TIPS Reports including TIPS Billing Reports
Resources Staff)		Can submit Electronic Upload files
Update/Tribe/C	Same as Update/Tribe role with addition of Authorized	Can create/update enrollee SF 2809s, SF 2810s, and contact records (except TSO)
(e.g. Authorized Maintenance Contact)	Contact record update access	 Can view/download TIPS Reports including TIPS Billing Reports
		Can submit Electronic Upload files
Audit/Tribe	Same as Update/Tribe role but	Can view enrollee, SF 2809s and SF 2810s
	with read-only access to	Can view/download TIPS Reports
(e.g. Finance Staff)	records	

Online Inquiry Submission Website (Requester Console) Setup



- At the conclusion of your Tribal Employer setup process your TBO will be given a user ID and password to use NFC's online inquiry resolution system: Requester Console
- Requester Console lets TBOs submit inquiries or help desk requests to the TIPS Contact Center via the internet
- A TIPS Contact Center representative will contact TBOs with the steps required to establish a Tribal Employer's account for Requester Console use, which may include adding users in addition to the TBO

Lesson 1 Knowledge Check



- 1. Who are the five key FEHB stakeholders?
 - Tribal Employees, Tribal Employers, NFC, OPM, and FEHB Plan Carriers
- 2. What is the name of the insurance system for Tribal Employers maintained by NFC?
 - Tribal Insurance Processing System (TIPS)
- 3. What contact is responsible for entering enrollment and plan changes into TIPS?
 - Tribal Employer
- 4. What contact works with NFC to establish TIPS user identifications for the Tribal Employer?
 - Tribal Security Officer (TSO)

Lesson 1 Summary



- Now that you have completed this lesson, you should be able to:
 - Describe the FEHB program
 - Identify the legislation that extends FEHB to Indian Tribes,
 Tribal Organizations, and Urban Indian Organizations
 - Identify who is eligible for FEHB
 - List the FEHB key stakeholders relative to TIPS
 - Explain how FEHB key stakeholders interact with each other
 - Describe how Tribal Employers join FEHB and the FEHB Tribal Agreement Package

Lesson 2: TIPS and Enrollments



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Break	10 minutes
Lesson 6: Obtaining Additional Assistance	30 minutes
TIPS Transactions Reference Section	10 minutes
Final Review and Evaluation	35 minutes

Lesson 2 Objectives



- By the end of this lesson, you should be able to:
 - Define TIPS
 - Identify how TIPS supports Tribal Employers
 - Identify the components of a SF 2809 and SF 2810 in TIPS
 - Explain the process for performing employee enrollment transactions in TIPS
 - Explain the enrollment reconciliation process

What is the Tribal Insurance Processing System (TIPS)?



- A web-based system of record for FEHB enrollment information
- Administered by NFC
- Used by Tribal Employers to perform FEHB enrollments

THER HALFARE PROCESSING					
Username:	Log In		Getting Started		
Password:	Submit		Healthcare and Insurance for Tribes		

Functions of TIPS





TIPS Discussion





Functions of TIPS





What information do I need to submit enrollments in TIPS?

• Enrollments are based on the SF 2809 and SF 2810:

SF 2809: Health Benefits Election Form

न्दील	Form Approved: CMM No. 3206-0160	Part B - FEHB Plan You Are Currently Enrolled 1. Pinn name	d In ((fapplicable) Part C - FEHB	Plan You Are Enrolling In or Changing To [2. Enrollment code
Entrol Environment	tion Form			
Heath Benefis Program		Part D - Event That Permits You To Enroll, Cha	nge, or Cancel (see page 2) Part E - Election	on NOT to Enroll (Employees Only)
Part A Enrollee and Family Member Information (For additional fainty members Enrollee name (hat, first, middle twise) Social Security number	are a separate sheet and attach.) 3. Date of birth (webidlyyy) 4. Sex 5. Are you married? M F Yes No	1. Event code 2. Date of ev	ent I do NOT wa My signatu information	at to earoll in the FEHB Program. re in Part H certifies that I have read and understand the 1 on page 3 regarding this election.
6. Home mailing address (tochading ZIP Code)	7. If you are covered by Medicare, check all that apply. A B D	Part F - Cancellation of FEHB I CANCEL my enrollment.	Part G - Suspe I SUSPEND	nsion of FEHB (Annuitants/Former Spouses Only) my euroliment.
	9. Are you covered by insurance other than Medicate?	My signature in Part H certifies that I have re information on page 3 regarding cancellation	ad and understand the My signatu of enrollment. information	re in Part H certifies that I have read and understand the n on page 4 regarding suspension of enrollment.
10.Indicate the type(s) of other insurance:	Yes, indicate in item 10 below. No	Part H - Signature WARNING: Any intentionally false statement in this and	dication or willful misrepresentation relative the	veto is a violation of the law punishable by a fine of not more than
TRICARE Other: Name of other insurance:	Policy number:	\$10,000 or imprisonment of not more than 5 years, or be	eh. (18 U.S.C. 1001.)	2 Deta (um (ddisse)
FEHB An FEHB saf and family anrollment covers all eligible family members. No person may 10 on page 1.	be covered under more than one FEHB enrollment. See instructions for item	2. Encol address		
11. Name of family member (last, first, assiddle astrial) 12. Social Security number	13.Date of birth (www3ddjggg) 14.Sex 15.Relationship code	3. Einte augess		 Freesless inspecter sources
16. Address (if different from enrollee)	M F 17. If you are covered by Medicare Claim Number Medicare check all that apply.	Part I -To be completed by agency or retirement REMARES	t system	().
	A B D 19 Are you covered by insurance other than Medicare?			
	Yes, indicate in item 20 below. No			
20. Indicate the type(s) of other insurance: TEICARE Other: Name of other insurance:	Policy number:			
FEHB An FEHB zelf and family enrollment coverz all eligible family memberz. No perzon may 10 on page 1.	be covered under more than one FEHB enrollment. See instructions for item	1. Date received (mm idd/yyyy)	2. Effective date of action (mm/idd/yyy)	3. Personnel telephone number
21. Email address (if home address is different from enrollee's)	 Preferred telephone number (if howe address is different from enrolled 1) 	4. Name and address of agency or retirement system		5. Authorizing official (please print)
23. Name of family member (last; first, assidile suital) [24. Social Security number	25. Date of birth (mm/dd/jjjjj) 26. Sex 27. Relationship code			6. Signature of authorized agency official
28. Address (if different from enrollee)	29. If you are covered by Medicare, check all that apply.	7. Payroll office number	8. Paytoll office contact (please print)	9. Payroll telephone number
	31. Are you covered by insurance other than Medicare?			()
32 Indicate the type(c) of other insurance:	Yes, indicate in item 32 below. No			
TRICARE Other: News of other incomment	Policy samples			
FEHB An FEHB self and family enrolment covers all eligible family members. No person may 10 on page 1.	be covered under more than one FEHB enrollment. See instructions for item			
33.Email address (if home address is different from enrollee's)	34.Preferred telephone number (if howe address is different from enrollee's)			
35. Name of family member (last, first, widdle initial) 36. Social Security number	37. Date of birth (www.idd/9333) 38. Sex 39. Relationship code			
40. Addams (if different from enrollee)	41. If you are covered by Medicare, check all that apply. 42. Medicare Claim Number			
	A B D 43. Are you covered by insurance other than Medicate?			
44 Indicate the type(s) of other insurance. TRECARE Other: Name of other insurance:	Yes, indicate in item 44 below. No Policy number:			
FEHB An FEHB self and family enrollment covers all eligible family members. No person may 10 on page 1.	be covered under more than one FEHB enrollment. See instructions for item			
45. Email address (if home address is different from enrolled's)	46 Preferred telephone number ((f home address is different from enrollee's)			
NSN 7540-01-231-6227 (continued on the revers U.S. Office of Personnel Management For agency distribution of copies, see page	e) Standard Form 2009 Revised August 2011 5 of the instructions. Previous edition is not usable	PRINT	R	Standard Form 2809 Revense of revised August 2011 Previous edition is not usable







The SF 2809 has nine parts. Only six are included on the SF 2809 in TIPS

SF 2809 Paper Copy

- A. Enrollee and Family Member Information
- B. FEHB Plan You Are Currently Enrolled In
- C. FEHB Plan You Are Enrolling In or Changing To
- D. Event That Permits You To Enroll, Change, or Cancel
- E. Election NOT to Enroll
- F. Cancellation of FEHB
- G. Suspension of FEHB
- H. Remarks
- I. To be completed by agency or retirement system

SF 2809 in TIPS

- A. Enrollee Information Enrollee Information *Continued; Family Members*
- B. FEHB Plan You Are Currently Enrolled In (If Applicable)
- C. FEHB Plan You Are Enrolling In or Changing To
- D. Event That Permits You To Enroll, Change, or Cancel
- F. Cancellation
- I. To be completed by Tribal Employer

SF 2809 in TIPS



TIPS	TRIB	AL INSU	RANCE	PROCE	SSING	SYSTEM		
HOME	INQUIRY	FORMS	ADMIN	INFORMATION			Welcome, Upo ROLE: Updat	late ForUpdates e/NFC [Logout]
Health Benef	fits Electio	n Form (280)9)					
Tribal HR SF2809 Information		`						
Tribe Sample Tribe		-		POI Test POI	•		S	F2809 Status: New
Part A - Enrollee Information (F	or additional family mem	bers, use the Part A (Continue	d) section below.)					1.0.0
Enrollee First Name		Middle N	lame		Last Name			
		a : 1a						
Preferred Telephone Number (xxx	I)XXX-XXXX	Social Se	cunty Number		Date of birth (MM/DD/YYYY)		
Sex Are you	married? Home mail	ing address		Address Line 2		City	State	Zip
⊙ Male ○ Female ○ Yes	No	ing data out		Tidaloss Ento 5		city	_	
Medicare (if you are covered by	Medicare Claim Numbe	r Are vo	u covered by insurance of	her than Indicate other t	vnes of insurance Nam	e of insurance	Policy no	
Medicare, check all that apply)		Medic	are?	Tricare	FEHB Other		10109110	
A B D		🔘 Ye	s 💿 No					
Part B - FEHB Plan You Are Cu	rrently Enrolled In (If App	olicable)		Part C - FEHB Plan You A	re Enrolling In or Chang	ing To		
1. Plan name		2. Enrollment code		1. Plan name		2. Enrollment code		
Part D - Event That Permits You	To Enroll, Change, or Ca	ncel				Part F - Cancellation		
1. Event code		2. Date of event (MM/DD/YY)	(Y)	Premium Conversion		I CANCEL my enrollme	ent.	
Part I - 10 be completed by 1 riba REMARKS	l Employer							
1. Date received (MM/DD/YYYY))	2. Effective date of action (MIN	I/DD/YYYY)	3. Personnel telephone num	ıber	4. Name and address of the	e Tribal Employer	
5 Authorizing official	(HT)	6 Darmall office mumber		7 Service Previder Centret		9 Service Previder Teleph		
5. Automzing official		14050000		National Finance Center		855-632-4468	one	
Part A - Enrollee Information ("ontinued: Family Membe	225				-		
Add/Edit Family Member In	formation							
First Name	Middle Na	me	Last Name	Soc	ial Security Number	Date of birth (M	M/DD/YYYY)	
						6 72	a	- .
Sex Home n	nailing address		Address Line 2			City	State	Zıp
O Iviale O Female								
Medicare (if you are covered by Medicare check all that apply	Medicare Claim Numb	er Are yo Medic	ou covered by insurance of are?	ther than Indicate other t	ypes of insurance Name	e of insurance	Policy no.	
ABD		() Ye	s (i) No	Incare 1	TERB Other			
Relationship Type:							ACIC	neamen
Family Members Entered No Family Members Currently Entered.								
		Can	icel Clear	Save Su	ıbmit			
			Hor	ne OPM				

Tribal HR SF 2809 Information

- When completing a SF 2809 in TIPS begin by selecting a:
 - Billing Unit/POI
- Tribe name will be prepopulated by TIPS

Tribal HR SF2809 Information			
Tribe	POI		SE7800 Status
Sample Tribe	Test P	• IO	New




Part A – Enrollee Information

- Enter Tribal Employee's:
 - Full Name
 - Telephone Number
 - Social Security Number
 - Date of Birth
 - Sex

- Marital Status
- Mailing Address
- Medicare Information
- Other Insurance Information
- Email Address (optional)

Part A - Enrollee Information (For additional family members, use the Part A	Continued) section below.)	
Enrollee First Name	Middle Name	Last Name
Preferred Telephone Number (xxx)xxx-xxxx	Social Security Number	Date of birth (MM/DD/YYYY)
Sex Are you married? Home mailing address	Address Line 2	City State Zip
🔘 Male 🔘 Female 🔘 Yes 💿 No		
Medicare (if you are covered by Medicare Claim Number Medicare, check all that apply)	Are you covered by insurance other than Indicate other types of in Medicare? Tricare FEHB	surance Name of insurance Policy no. Other
	🔘 Yes 🛛 🔍 No	





Part B and C – FEHB Plan You Are: Currently Enrolled In / Enrolling in or Changing To

- Enter Tribal Employee's:
 - New enrollment code if the Tribal Employee is enrolling in FEHB or selecting a new FEHB plan
- Current enrollment code pre-populates with information from previous SF 2809
- The FEHB Plan you are currently enrolled in is never editable

Part B - FEHB Plan You Are Currently Enrolled In (li	Applicable)	Part C - FEHB Plan You Are Enrolling In or Changing To)
1. Plan name	2. Enrollment code	1. Plan name	2. Enrollment code

					OMATION					
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What Are Enrollment Codes?

- Enrollment codes are specific to:
 - Self Only Plans
 - Self & Family Plans
- Enrollment code is a three digit alphanumeric code:
 - Codes ending in 1 and 4 refer to Self
 Only plans
 - Codes ending in 2 and 5 refer to Self
 & Family plans
- Self Self & Family 221 222 224 225 JN4 JN5 JN1 JN2 474 475 471 472 111 112 104 105 2G1 2G2 2G4 2G5 421 422

Sample Enrollment Codes

- A list of event codes is available on the paper SF 2809 at:
 - <u>http://www.opm.gov/Forms/pdf_fill/SF2809.pdf</u>



Part D – Event That Permits You To Enroll, Change, or Cancel

- Enter Tribal Employee's:
 - Event Code

rt D - Event That Permits You To Enroll, Change, or Cancel

l. Event code

- Refers to a specific Qualifying Life Event (QLE)
- A valid event code is required on all SF 2809s

2. Date of event (MM/DD/YYYY)

- Select a Date of Event
 - The date an employee becomes eligible for enrollment, change of coverage, or cancellation as defined by the event code
- Check Premium Conversion if Tribal Employee participates
 - The Premium Conversion box must be checked for Series 1 event codes

Premium Conversion

 If the employee's Billing Unit/POI does not participate in premium conversion, the employee will be unable to check the Premium Conversion box



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Part F - Cancellation

I CANCEL my enrollment.

Sample Event Codes



Event	Code	
Premium Conversion	Non- Premium Conversion	Description
1A	5A	Initial opportunity to enroll
1B	5B	Open season
1C	5C	Change in family status that increases or decreases number of eligible family members
1D	5D	Reemployment after a break in service of more than three days

A list of event codes is available on the paper SF 2809 at: <u>http://www.opm.gov/Forms/pdf_fill/SF2809.pdf</u>

Part F – Cancellation

- In order to submit a SF 2809 for a cancellation check the box in part F
 - Enrollees in premium conversion may only cancel following a valid QLE
 - Employees NOT participating in premium conversion may cancel at any time
 - Event Code and Date of Event are NOT required for a cancellation if the Tribal employee is not participating in premium conversion

Part D - Event That Permits You To Enroll, Change, or Ca	art D - Event That Permits You To Enroll, Change, or Cancel				
1. Event code	2. Date of event (MM/DD/YYYY)	Premium Conversion	I CANCEL my enrollment.		
		# <u>*</u>			



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Part I – To be Completed by Tribal Employer

- Enter:
 - Date the employee's SF 2809 was received by Tribal Employer
 - The date that any enrollment, change in coverage, or cancellation takes effect
 - The telephone number for the HR contact responsible for the employee or Tribal Employer benefits
 - Name and Address of Tribal Employer
 - The name of the Tribal Employer official authorizing the form

Part I - To be completed by Tribal Employer			
REMARKS			
1. Date received (MM/DD/YYYY)	2. Effective date of action (MM/DD/YYYY)	3. Personnel telephone number	4. Name and address of the Tribal Employer
i i i i i i i i i i i i i i i i i i i		-	
5. Authorizing official	6. Payroll office number 14050000	7. Service Provider Contact National Finance Center	8. Service Provider Telephone 855-632-4468





Part I – To be Completed by Tribal Employer (cont.)

- TIPS prepopulates:
 - Payroll Office Number (PON)
 - Service Provider Contact
 - Service Provider Telephone

Part I - To be completed by Tribal Employer			
REMARKS			
1. Date received (MM/DD/YYYY)	2. Effective date of action (MM/DD/YYYY)	3. Personnel telephone number	4. Name and address of the Tribal Employer
5. Authorizing official	6. Payroll office number	7. Service Provider Contact	8. Service Provider Telephone
-	14050000	National Finance Center	855-632-4468





Part A – Enrollee Information *Continued; Family Members*

- To add family members:
 - First check Add/Edit Family Member Information
 - Complete the enrollee information fields
 - Specify the relationship type of the family member
 - Click Add Member
 - All required fields must be completed to add a family member
 - Family members' information will not be saved if it has not been attached via the "Add Member" button

Part A - Enrollee Infor	mation Continued; Fa	unily Members								
Add/Edit Family M	ember Information									
First Name		Middle Name		Last Name		Social Security Numbe	r	Date of birth (MM/DI)/YYYY)	_
Sex	Home mailing addres	s		Address Line 2				City	State	Zip
🔿 Male 💿 Female										
Medicare <i>(if you are co</i>	overed by Medicare	Claim Number	Are you co	wered by insurance other than	Indicate of	her types of insurance	Name of insurance		Policy no.	
Medicare, check all th	at apply)		Medicare?		Tricare	FEHB Other				
A B D			Yes	No						
Relationship Type:			T						Add	l Member
Family M	embers Entered									
			N	No Family Members Curren	tly Entere	d.				





Sample Relationship Codes



 To enter a paper SF 2809 in TIPS, one must be familiar with the following relationship types and respective codes:

Relationship Status Code	TIPS Relationship Type
01	Spouse
09	Adopted Child
10	Foster Child
17	Stepchild
19	Child under age 26
99	Disabled Child age 26 or older who is incapable of self-support because of a physical or mental disability that began before his/her 26th birthday

Exercise 2.1: Paper SF 2809 vs. SF 2809 in TIPS



- You should have received a handout containing a:
 - Completed paper SF 2809
 - Blank printout of the SF 2809 in TIPS
- Use the completed Paper SF 2809 with fields highlighted to fill out the blank printout of a SF 2809 in TIPS

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You have 5 minutes to complete this exercise



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Sex Are y O Male O Female O Y	ou married? es 💿 No	Home mailing address 210 10th St.		Address	Line 2	City Nashville	State Zip TN 3723	35
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Part B - FEHB Plan You Are 1. Plan name Part D. Frant That Parmite J	Currently Enro	illed In (If Applicable) 2. Enrollment code		Part C - 1 1. Plan na	FEHB Plan You Are Enrolling In or C ame	Changing To 2. Enrollment code 892		
1. Event code 5C	ou to E nron, C	2. Date of event (N 03/27/2012	/M/DD/YYYY)	Prem	ium Conversion	I CANCEL my enroll	ment.	

Completed SF 2809 in TIPS – Part 2 of 2





Exercise 2.2: Identifying the Appropriate QLE Code



- You should have received a:
 - List of QLE codes
 - QLE handout
- Use the list of QLE codes to complete the QLE handout

Exercise 2.2: Identifying the Appropriate Event In order to review SF2809S Tribal Employers must be familiar with the Qualifying LIFE Event Codes and under what circumstances each is applicable. Exercise 2.2 will cover a series of eight scenarios. In each scenario, identify: Event Code Event Code Scenario 1:	Scenario 2: Sally, a Tribal Employee enrolled in FEHB, takes a three month leave of absence beginning May 5, 2012 during which she shifts from pay status to nonpay status and she her FEHB coverage is terminated. Sally resumes working for the Tribal Employer on August 8, 2012 and submits a 5F2809 to receive coverage with an effective date of September 1, 2012. Sally participates in premium conversion.
Sarah, a Tihbal Employee who has been an employee of the Tihbal Employee for two years, opts lop in FEHB for the first time during open season. Open season lasts from November 12, 2012 to December 10, 2012. Sarah submits a SF2809 to her Tihbal Employer on November 29, 2012 with an effective date of January 1, 2013. Sarah does not participate in premium conversion. Zan D-Intel Tel Ferein Yes To Intel (Charge or Cated L Event code	Scenario 3: Mark, a new Tribal Employee hired on April 3, 2012, opts to enroll in the FEHB program. Mark completes a SF2809 on April 10, 2012 and submits it to his Tribal Employer requesting an effective coverage date of May 1, 2012. Mark is enrolled in premium conversion. 2 Dist of ever (ADMDD 11311) [2]

You have 5 minutes to complete this exercise



The SF 2810 has eight parts. Six of these parts are included on the SF 2810 in TIPS

SF 2810 Paper Copy

- A. Identifying Information
- B. Termination
- C. Transfer In
- D. Reinstatement
- E. Change In Name of Enrollee
- F. Change In Enrollment-Survivor Annuitant
- G. Remarks
- H. Date of Notice

SF 2810 in TIPS

- A. Identifying Information
- B. Termination
- D. Reinstatement
- E. Change In Name of Enrollee
- G. Remarks
- H. Date of Notice

SF 2810 in TIPS



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American Native Tribe				TEST POI 2A-1				New	
Part A - Identifying Information	1				D. alia		a		
Last Name Eletcher	First name		Middle Initial		Date of birth		Social security number		
Home Address	Alex				Payroll office n	number	Enrollment code number		
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City	State		21p 21321						
Part P. Tormination			21321						
Your enrollment terminates Important Notice: You have the on the back of this form for infor if termination is due to death of Part D. Painterena	Your enrollment terminates on the date in Part A, item 8, above. However, your coverage is extended for 31 days after that date. Important Notice: You have the right to convert to an individual (nongroup) contract with the carrier of your plan. You also may have the right to temporarily continue your group coverage. See Part B - Termination of the back of this form for information about 31-day extension of coverage, conversion, and temporary continuation of coverage. Date of death (mo, dy, yr) If termination is due to death of enrollee enter date of death If termination is due to death of enrollee enter date of death								
Part D - Keinstatement									
Your enrollment has been re	instated effective on the date	in Part A, item 8, above.							
Part E - Change in Name of Enr	ollee								
The name under which this e	enrollment is carried has been	changed to:			Chang	ad Middle News			
Changed Last Name		Changed Fir	st name		Change	ed Middle Name			
Date of birth									
Changed Address									
Changed Address Line 2									
Changed City		Changed Sta	te		Chang	ed Zip			
Part G - Remarks									
Part H - Date of Notice									
Name of Agency				Personnel Contact La	ast Name	Personnel Contact First name	Personnel Contac	t Middle Initial	
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Tribal HR SF 2810 Information

- When completing a SF 2810, TIPS will prepopulate the employee's:
 - Tribal Employer
 - Billing Unit/POI

Tribal HR SF2810 Information		
Tribe	POI	SF2810 Status:
Tribal Employer 1	TEST POI 2A-1	New





Part A – Identifying Information

- TIPS will prepopulate:
 - Full Name
 - Date of Birth
 - Social Security Number
- Payroll Office Number(PON)

Mailing Address

- Enrollment code number
- Enter the employee's:

- Date this action becomes effective

art A - Identifying Information							
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Address Line 2			Date this action becomes effective				
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Part B – Termination

- In order to submit a SF 2810 for termination check the box in part B
 - Only enter date of death if termination was due to the death of the employee
- Tribal Employees who separate from Tribal employment are eligible for:
 - 31-day extension of coverage
 - Temporary Continuation of Coverage (TCC)



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Part B - Termination	
Wour enrollment terminates on the date in Part A, item 8, above. However, your coverage is extended for 31 days after that date. Important Notice: You have the right to convert to an individual (nongroup) contract with the carrier of your plan. You also may have the right to temporarily continue your group coverage. See Part B - Termination on the back of this form for information about 31-day extension of coverage, conversion, and temporary continuation of coverage. If termination is due to death of enrollee enter date of death	Date of death (mo, dy, yr)

- In order to reinstate an employee, check the box in part D
 - The reinstatement will take effect on the effective date specified in Part A
 - Possible reasons for reinstatement include:
 - Employee returns from military service
 - Erroneous error

Part D - Reinstatement

Vour enrollment has been reinstated effective on the date in Part A, item 8, above.

TURNEL INSURANCE PROCESSING SYSTEM
Variable Vari



Part D – Reinstatement

Part E – Change in Name of Enrollee

- In order to change the name of the enrollee, check the Box in Part E
- Enter the employee's full new name and address

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Part E - Change in Name of Enrollee							
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Changed Address							
Changed Address Line 2							
Changed City	Changed State	Changed Zip					
	▼						



- Add any relevant remarks here
 - Remarks may be used by the Tribal Employer to include notes
 - These notes are stored in TIPS, but will not be seen by anyone outside of the Tribal Employer



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Part G – Remarks

Part H - Date of Notice				
Name of Tribal Employer	Personnel Contact Last Name	Personnel Contact First name	Personnel Contact Middle Initial	Personnel Phone Number
Agency Address		Agency Address Line 2	Service Provider Contact National Finance Center	Service Provider Telephone 855-632-4468
City	State	Zip		
Authorizing Official Last Name	Authorizing Official First name	Authorizing Official Middle Initial	Date	

- Enter Tribal Employer's information:
 - Name of Tribal Employer
 - Tribal Employer Address
 - Personnel Contact Name
 - Payroll Contact Name
 - Payroll Contact Telephone Number
 - Authorizing Official Name
 - Today's Date

Part H – Date of Notice





Exercise 2.3: Paper SF 2810 vs. SF 2810 in TIPS



- You should have received a handout containing a:
 - Completed paper SF 2810
 - Blank printout of the SF 2810 in TIPS
- Use the completed Paper SF 2810 with fields highlighted to fill out the blank printout of a SF 2810 in TIPS





You have 5 minutes to complete this exercise

Completed SF 2810 in TIPS – Part 1 of 2





Completed SF 2810 in TIPS – Part 2 of 2

Part E - Change in Name of Enrollee							
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Date of birth							
l							
Changed Address							
Changed Address Line 2							
Changed City		Changed State			C	hanged Zip	
Part G - Remarks							
Part H - Date of Notice							
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Agency Address				Payroll Contact Last Name		Payroll Contact First name	Payroll Contact Middle Initial
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Agency Address Line 2			Payroll Telephone Number		Number		
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Transaction Glossary



Initial Enrollment	A Tribal Employee enrolls in FEHB for the first time	Enrollment Termination	A Tribal Employer Billing Unit/POI involuntarily ends the FEHB enrollment of a Tribal Employee		
Enrollment Change	A Tribal Employee enrolled in FEHB changes his or her health plan enrollment	Billing Unit/POI Cancellation	A Tribal Employer Billing Unit/POI opts to dis-enroll from FEHB and ends coverage for its employees		
Change of Name	A Tribal Employee enrolled in FEHB changes his or her legal name	Billing Unit/POI Termination	A Tribal Employer Billing Unit/POI has the FEHB enrollment involuntarily ended for its employees		
Enrollment Cancellation	A Tribal Employee enrolled in FEHB opts to dis-enroll and ends his or her coverage	Change of Address	A Tribal Employee enrolled in FEHB changes his or her primary address		

The Role of TIPS in FEHB Transactions



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- Tribal Employer completes a SF 2809 in TIPS
- TIPS Processes SF 2809s and sends to FEHB Plan Carriers

• Transactions:

- Initial Enrollment
- Enrollment Change
- Cancellation

SF 2810

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- Tribal Employer completes a SF 2810 in TIPS
- TIPS Processes SF 2810s and sends to FEHB Plan Carriers

• Transactions:

- Change of Name
- Termination
- Reinstatement

OPM



- OPM cancels / terminates coverage for a Tribal Employer Billing Unit/POI
- TIPS prepares SF 2809s for and sends to FEHB Plan
 Carriers
- TIPS stores SF 2810s

Transactions:

- Tribal Employer Billing Unit/POI
 - Cancellation
 - Termination



Enrollment Reconciliation Process

- NFC and FEHB Plan Carriers reconcile enrollment records quarterly using CLER
- CLER is a NFC web-based system that receives and processes enrollment data from government agencies and FEHB Plan Carriers
- FEHB Plan Carriers and NFC submit their enrollments to CLER
- After CLER processing, NFC communicates with Tribal Employers and Carriers to resolve discrepancies, as needed (it's possible you may never receive any communication from the NFC CLER team)





Enrollment Reconciliation Process





Lesson 2 Knowledge Check



- 1. What are the four main TIPS functions?
 - Enrollments, Billing, TIPS Reports, and Special Transactions
- 2. Tribal Employers complete what two forms in TIPS to perform FEHB transactions?
 - A SF 2809 or SF 2810 would be completed in TIPS
- 3. True or False: The premium Conversion Box must be checked for an employee using an event code 1A
 - True
- 4. OPM uses TIPS to perform what two FEHB transactions?
 - Tribal Employer Billing Unit/POI Cancellation
 - Tribal Employer Billing Unit/POI Termination

Lesson 2 Summary



- Now that you have completed this lesson, you should be able to:
 - Define TIPS
 - Identify how TIPS supports Tribal Employers
 - Identify the components of a SF 2809 and SF 2810 in TIPS
 - Explain the process for performing employee enrollment transactions in TIPS
 - Explain the enrollment reconciliation process



Break – 10 Minutes

Lesson 3: Billing and TIPS Reports



Lesson 1: FEHB Overview	30 minutes
Lesson 2: TIPS and Enrollments	45 minutes
Break	10 minutes
Lesson 3: Billing and TIPS Reports	45 minutes
Morning Review	20 minutes
Lunch	60 minutes
Lesson 4: Special Transactions	30 minutes
Lesson 5: Performing Transactions in TIPS	90 minutes
Break	10 minutes
Lesson 6: Obtaining Additional Assistance	30 minutes
TIPS Transactions References	10 minutes
Final Review and Evaluation	35 minutes

Lesson 3 Objectives



- By the end of this lesson, you should be able to:
 - Explain the billing and payment processes
 - Identify the fields on a Billing Report
 - Calculate a Billing Report
 - Explain the Insufficient Funds Resolution Process
 - List the available TIPS Reports
 - Identify the fields on a TIPS Report

Functions of TIPS




Billing Overview



- Each Tribal Employer must establish one or more Billing Unit/POIs to help organize Tribal Employee enrollments for different Tribal entities/businesses
- Tribal Employers must provide a bank account and routing number for each Billing Unit/POI





The routing and account numbers may be in different places on your check.

Billing Overview (cont.)

- A **Preview Billing Report** can be generated in TIPS at any point during the month. This is a snapshot of the final bill
- A Final Billing Report can be generated in TIPS on the last calendar day of the month. This amount reflects the amount that will be deducted from the Billing Unit/POI's account
- Electronic Billing Reports are prepared and linked to accounts at the Billing Unit/POI-level, not the Tribal Employerlevel





TIPS Billing Report



- TIPS users can view their preview Billing Report at any time
- Each Billing Report contains:
 - Tribal Employer
 Number
 - Billing Unit/POI
 - Enrollee Name
 - Enrollee SSN

- Enrollment Code
- Premium Amount
- Administrative Fee
- Adjustments

- Total Premium Amount
- Total Administrative Fee
- Total Adjustments
- Total Bill Amount
- TRIBAL INSURANCE PROCESSING SYSTEM HOME INQUIRY FORMS ADMIN INFORMATION Billing Report Stephanie Delete Test ▼ POI: 9873-Delete ▼ Generate Report Tribal Organization Billing Period 05/31/2012 Enrollee SSI 3A 6026 Jane Doe 111223333 105 1328.7 15.15 0 1343. 603.03 3A 6026 John Doe 222334444 JK1 587.88 15.15 0 3A 6026 Sarah Doe 333445555 104 322.39 15.15 0 337.54 6026 Frank Doe 3A 444556666 JK2 1338.36 15.15 0 1353.51 Total: \$3577 33 Total: \$60.60 Total: \$0.00 Total: \$3637.93 Export to Excel
- Enrollee Bill Amount

Calculating a Billing Report

- TIPS THERE AND CE PROCESSING
- Billing Reports are composed of two components:
 - Plan premium Administrative fee
- The formula to calculate each Billing Reports is:

(Plan premium) + (Administrative fee) = Amount Due

- TIPS adds up the premiums and administrative fees for Tribal Employees in your Tribal Employer Billing Unit/POI to calculate a Billing Report
- For example, the cost for self-only Puerto Rico Triple-S Salud, Inc. FEHB Plan would be:

(\$335.57) + (\$15.15) = \$350.72

Prorated Billing



- Premiums are prorated when coverage does not start on the first of the month
- The administrative fee is never prorated
- The formula to calculate a prorated bill is:

(Plan premium) X (Days covered / Days in month) + (Administrative fee) = Amount Due

 The prorated cost for self-only Puerto Rico Triple-S Salud, Inc. from May 7th until the end of the month would be:

(\$335.57) X (25/31) + (\$15.15) = \$285.77

Billing Process





Billing Calendar



MAY								
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday		
20	21	22	23	24	25 PADS account information/ changes due	26		
27	Memorial Day 28	29	30	31 Cutoff at 11:59pm MT for TIPS entries to be reflected on current bill and June 1 effective date	1 PADS Proc	2 cessing Period		

View Billing Calendar

- The Billing Report closes for the month on the last calendar day of the month at 11:59 PM Mountain Time
- Changes to a Tribal Employer Billing Unit/POI TIPS bank account information must be submitted at least three business days before a Tribal Employer Billing Unit/POI Billing Report closes

Billing Calendar (cont.)



JUNE								
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday		
27	28	29	30	31 Cutoff at 11:59pm MT for TIPS entries to be reflected on current bill and June 1 effective date	1 PADS Proc	2 essing Period		
3 PADS Proces	4 ssing Period	5 PADS debits bank account for bill amount	6	7	8	9		

View Billing Calendar

- PADS prepares to debit the Tribal Employer Billing Unit/POI bank account provided in TIPS over the first two business days of the month
- PADS debits the Tribal Employer Billing Unit/POI bank account on the third business day of the month

FEHB Insufficient Funds Resolution Process



URANCE PROCES

Functions of TIPS





Available TIPS Reports

- There are 12 principal TIPS Reports available from the lefthand side of the TIPS main page
- Required Report Criteria (for non-Billing Reports): Billing Unit/POI, Start Date, and End Date
- TIPS Reports can be viewed in:
 - The TIPS web portal
 - Microsoft Excel

Reports

Enrollees by Tribe, State, Age Bands, and Plan Report <u>Contact Information Report</u> <u>New Enrollees by Tribe Report</u> <u>Disenrollments by Tribe Report</u> <u>Total Enrollees Each Period By Tribe Report</u> <u>Open Season Changes By Tribe Report</u> <u>Reason for Plan Switch by Tribe Report</u> <u>Effective Date of Coverage Report</u> <u>Effective Date of Coverage Report</u> <u>Family Relationships by Tribe Report</u> <u>Overall 2809/2810 Report</u> <u>Billing Report</u>



Available TIPS Reports



• The following TIPS Reports will be available on-demand:

	Level of Detail			
Report Name	Billing Unit/POI	Tribal Employer		
Enrollees by state, age, and plan		✓		
New enrollees	✓	✓		
Dis-enrollments	1	✓		
Total number of enrollees	✓	✓		
Contact information	✓	✓		
Open Season changes	✓	✓		
Reason for plan switch	✓	✓		
Effective coverage date	✓	✓		
Family Relationship		1		
Overall 2809/2810	✓	✓		





• TIPS Reports exported to Excel allow for easy customization by Tribal Employers

	- -	(°I - 🗳	A			-			Report[1].xls -
File	e H	ome	Insert	Page Layout	Formulas	Data	Review	View	
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		А		В		С		D	E
1	Tribal	Organi	ization	POI	Effec	tive Dat	te of	Total Actions	
2	2A			1001		4/3/2	012 0:00	1	
3									
4									

Preparing a SF 2809/SF 2810 Report



- The Overall SF 2809/SF 2810 Report contains source data for all Tribal Employees in your Tribal Employer Billing Unit/POI or Tribal Employer
- This TIPS report must be exported and cannot be viewed in its full form in the TIPS web portal

X	🚽 ") • (" • •	∢ <u>A</u> • -	and the second second	And and the other distances of the local dist	Report[1].xl	s - Microsoft Excel	-	A CONTRACTOR	State State State		x
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2	57	knight	chris	b	N	1/1/0001 12:00:00 AM			1/1/0001 12:00:00 AM		
з	46	Sugarman	Kimberly	Jonah	N	1/1/0001 12:00:00 AM		1A	1/1/0001 12:00:00 AM	AB5	
4	47	Doe	John	Michael	N	12/6/2012 0:00	1		2/6/2012 0:00	AB4	P
5	48	Joe	Doe	Michael	N	12/6/2012 0:00	1		2/6/2012 0:00	AB4	P.
6	55	Penn T2	Nathan T1		N	3/1/2012 0:00			1/1/0001 12:00:00 AM	AB4	P.
7	59	smith	joe	bob	N	2/28/2012 0:00	1		2/28/2012 0:00	ab4	S
8	60	LNAME115	FNAME115		N	1/1/0001 12:00:00 AM			1/1/0001 12:00:00 AM		- 11
9	61	junior	joe	bob	N	2/28/2012 0:00		1A	2/28/2012 0:00	ab4	S
10	62	awesomeness	test	ssn	N	2/28/2012 0:00		1a	2/28/2012 0:00	ab4	P.
11	64	Smith	John		N	1/1/0001 12:00:00 AM			1/1/0001 12:00:00 AM		- 11
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14											
15	TIPS_SF2810_SEQ	SSNO	ENROLLEE_LAST_NM	ENROLLEE_FIRST_NM	ENROLLEE_MIDDLE_NM	CHANGE_EFFECTIVE_DT	ENROLLMENT_CD	TERMINATION_IND	REINSTATEMENT_IND	TRANSFER_IN_IND	1
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17	11	111111111	L LastNm	FirstNm2	MiddleNm	2/4/2012 0:00	123	т	F	F	
18	6	111111111	L LastNm	FirstNm	MiddleNm	2/4/2012 0:00	123	т	F	F	
19	7	123456789	Doe	John	Michael	2/9/2012 0:00		F	F	F	
20	9	111111111	LastNm	FirstNm	MiddleNm	2/4/2012 0:00	123	т	F	F	
21	12	999555222	2 Doe	John	Michael	2/27/2012 0:00		F	F	F	
22	13	999555222	2 Doe	John	Michael	2/9/2012 0:00		F	F	F	
23	14	999555222	Doe	John	Michael	2/9/2012 0:00		F	F	F	
24	15	123456780	Doe	John	Michael	2/27/2012 0:00		F	F	F	
25	16	316497852	2 Hutt	Jaba	The	2/28/2012 0:00		F	т	F	
26	17	316497852	1 Hutt	Jaba	The	2/28/2012 0:00		F	F	T	
27	18	123128183	asdf	asdf		2/28/2012 0:00		F	F	F	
28	19	998089977	test	testing	testers	2/29/2012 0:00		F	F	F	
29	20	998089976	i test	testing	testers	2/29/2012 0:00		F	F	F	
30	21	998089979	est test	testing	testers	2/29/2012 0:00		F	F	F	
31	22	998089979) test	testing	testers	2/29/2012 0:00		F	F	F	
32	23	998089980) test	testing	testers	2/29/2012 0:00		F	F	F	
33	24	998089976	i test	testin	testers	2/29/2012 0:00		F	F	F	
34	25	998089976	i test	testin	testers	2/29/2012 0:00	ab4	F	F	F	
35	26	998089976	i test	testin	testers	2/29/2012 0:00	ab4	F	F	F	-
14	Report	1 💱				1	4				•

Exercise 3.1: Review a TIPS Report

- TIPS THE ANCE PROCESSING
- Read the Enrollees by Tribe, State, Age Bands, and Plan
- Please identify:
 - Tribal Organization code
 - The state of residence of the enrollees
 - The age band for the enrollees

TIPS	TRIBAL	INSURANCE	PROCES	SING SYSTE	M
HOME	INQUIRY	FORMS INFORMATIO	N		Welcome, tipstriu3 training ROLE: Update/Tribe [Logout]
Enrollees by]	Fribe, State, Age Ban	ds, and Plan			
Tribal Organization: Start Date:	All Available 3/1/2012	End Date: 3/31/2012	Ge	nerate Report	
	Tribal Organization 2B		State LA	Total 5	
	State LA			Total 5	
Tribal Organization	0-18	19-35	36-50	51-65	66-75
28	Total: 0	Total: 5	Total: 0	Total: 0	Total: 0
		G	rand Total		
All Pages Current Page		Include Grid Lines Export to Excel	,		
		<u>H</u>	ome OPM		

Lesson 3 Knowledge Check



- 1. Billing Reports will be divided up by what identifier?
 - The Billing Unit/POI
- 2. True or False: TIPS users can view their Billing Report at any time?
 - True
- 3. When does a Billing Report close?
 - At 11:59 PM Mountain Time on the last calendar day of the month
- 4. Billing Reports are composed of what 2 components?
 - The plan premium and administrative fee
- 5. TIPS reports can be viewed in what two ways?
 - TIPS web portal or Microsoft Excel

Lesson 3 Summary



- Now that you have completed this lesson, you should be able to:
 - Explain the billing and payment processes
 - Identify the fields on a Billing Report
 - Calculate a Billing Report
 - Explain the Insufficient Funds Resolution Process
 - List the available TIPS Reports
 - Identify the fields on a TIPS Report

Morning Review



Lesson 1: FEHB Overview	30 minutes
Lesson 2: TIPS and Enrollments	45 minutes
Break	10 minutes
Lesson 3: Billing and TIPS Reports	45 minutes
Morning Review	20 minutes
Lunch	60 minutes
Lesson 4: Special Transactions	30 minutes
Lesson 5: Performing Transactions in TIPS	90 minutes
Break	10 minutes
Lesson 6: Obtaining Additional Assistance	30 minutes
TIPS Transactions References	10 minutes
Final Review and Evaluation	35 minutes

Review





Please break into teams

Review Jeopardy!







This stakeholder is responsible for providing health insurance coverage to Tribal Employees.

Who are FEHB Plan Carriers?





This stakeholder is responsible for selecting plans and submitting enrollment requests to Tribal Employers.

Who are Tribal Employees?





This stakeholder is responsible for answering all FEHB policy questions.

Who is OPM?





This stakeholder maintains TIPS and provide TIPS training.

Who is NFC?





This stakeholder validates employee enrollment requests and plan change requests.

Who are Tribal Employers?





These two forms are used to perform enrollment transactions in TIPS.

What are the SF 2809 and SF 2810?





Who is responsible for entering SF 2809s and SF 2810s into TIPS.

Who are Tribal Employers?





If a Tribal Employer Billing Unit/POI cancels coverage, this system is responsible for preparing updated SF 2809s and submitting them.

What is TIPS?





Employees would select this series of event codes (1 Series, 2 Series, 3 Series, etc...) if they are participating in Premium Conversion.

What are 1 Series Codes?





Tribal Employers would submit what SF if they needed to terminate an Employee's coverage?

What is SF 2810?





This system is responsible for monthly premium collection.

What is PADS, the Pre-Authorized Debit System?





The Final Billing Report closes for the month on what day and at what time?

What is the last calendar day of the month at 11:59 PM Mountain Time?





If a Tribal Employer has an insufficient payment this organization will notify them.

Who is OPM?





What day of the month does PADS debit the Tribal Employer's bank account?

What is the third business day of the month?





A Tribal Employer adds five employees to its insurance coverage with an effective date of May 28th. The employees will be included for the first time on the Tribal Employer Billing Reports for this month's coverage.

What is May?







TIPS reports are available with what frequency.

What is all the time or on-demand?




TIPS Reports can be viewed in TIPS or exported to what program.

What is Microsoft Excel?





TIPS Reports are available at these two levels of detail.

What are the Billing Unit/POI-level and the Tribal Employer-level?





What three criteria must a user specify when preparing a TIPS Report.

What are the Billing Unit/POI, Start Date, and End Date?





A TIPS user would prepare this report if they wanted to see the source data for their Tribal Employees' SF 2809s and SF 2810s.

What is the Overall 2809/2810 Report?





By the end of this afternoon, you should be able to:

- Understand the Special Transactions in TIPS
- Access TIPS
- Perform enrollment transactions using TIPS
- Prepare TIPS Reports
- Review your Billing Report in TIPS
- Explain who to contact for additional assistance

HOME INQUIRY FORM	IS ADMIN	INFORMATION	ROLE: Update/NFC [Logout]
Enrollee			
Enrollees by Tribe, State, Age Bands, and Plan Report			
<u>I otal Enrollees Report</u> Overall New Enrollees Report			
Total Disenrollment Report			
Contact Information Report			
New Enrollees by Tribe Report			
Total Enrollees Each Period By Tribe Report			
Open Season Changes By Plan Report			
Open Season Changes By Thbe Report Reason for Plan Switch Report			
Reason for Plan Switch by Tribe Report			
Effective Date of Coverage Report			
Family Relationships by Tribe Report			
Billing Report Sample			
		Home OPM	



Lunch Break – 60 minutes

Functions of TIPS





Lesson 4: Special Transactions



Lesson 1: FEHB Overview	30 minutes
Lesson 2: TIPS and Enrollments	45 minutes
Break	10 minutes
Lesson 3: Billing and TIPS Reports	45 minutes
Morning Review	20 minutes
Lunch	60 minutes
Lesson 4: Special Transactions	30 minutes
Lesson 4: Special Transactions Lesson 5: Performing Transactions in TIPS	30 minutes90 minutes
Lesson 4: Special Transactions Lesson 5: Performing Transactions in TIPS Break	30 minutes90 minutes10 minutes
Lesson 4: Special TransactionsLesson 5: Performing Transactions in TIPSBreakLesson 6: Obtaining Additional Assistance	30 minutes90 minutes10 minutes30 minutes
Lesson 4: Special TransactionsLesson 5: Performing Transactions in TIPSBreakLesson 6: Obtaining Additional AssistanceTIPS Transactions References	30 minutes90 minutes10 minutes30 minutes10 minutes



- By the end of this lesson, you should be able to:
 - Explain the Enrollee Billing Unit/POI Transfer process
 - Describe the implications of adding a court ordered indicator to an employee's enrollment records
 - List the TIPS transactions that may be processed retroactively

FUTURE FUNCTIONALITY

Enrollee Billing Unit/POI Transfer



- In the future, the Enrollee Billing Unit / POI Transfer function will be used by Tribal Employers to transfer an employee enrolled in FEHB to a new Billing Unit / POI
- Enrollees in FEHB will be able to transfer to a new Billing Unit/POI from:
 - 1. A Billing Unit / POI managed by your Tribal Employer
 - 2. A Billing Unit / POI managed by another Tribal Employer participating in FEHB

Enrollee Billing Unit/POI Transfer (contd.)



- The gaining Tribal Employer will need to determine the following information for each enrollee in order to transfer him/her to its Billing Unit/POI:
 - First Name
 - Last Name
 - Social Security Number
- The gaining Tribal Employer will need to determine the *Effective Date of Coverage* for each transferred enrollee



Enrollee Billing Unit/POI Transfer (Contd.)



- As conceptualized, the following considerations must be acknowledged by the gaining Tribal Employer before transferring an enrollee to its Billing Unit/POI:
 - If the Effective Date of Transfer does not fall on the first of the month, the gaining Tribal Employer will be responsible for paying a prorated premium
 - The gaining Tribal Employer will not be able to change the enrollment code, address, etc. of the active employee enrolled in FEHB when completing a transfer. Such adjustments to FEHB coverage must be made through creating new SF 2809s/SF 2810s following the transfer

PLEASE NOTE: Current Transfer In requests should be submitted to the TIPS Contact Center: 1-855-NFC-4GOV; a customer notification will be released when the functionality is available

Manage Court Orders



 In the future, the Manage Court Orders function will be used by Tribal Employers to:

Add a court ordered indicator to an active enrollee record Remove a court ordered indicator from an active enrollee record View all active enrollee records that contain court ordered indicators

Manage Court Orders (contd.)



- Following the addition of a court ordered indicator, TIPS will prevent the active enrollee's records from:
 - Voluntarily being cancelled via a new SF 2809
 - Being switched from a Self & Family Plan to a Self Only Plan
- Following the removal of a court ordered indicator, TIPS will allow the enrollee's records to:
 - Voluntarily be cancelled via a new SF 2809
 - Be switched from a Self & Family Plan to a Self Only Plan

PLEASE NOTE: This functionality is not currently available; a customer notification will be released when the functionality is released. Please forward any related inquiries to the TIPS Contact Center: 1-855-NFC-4GOV

Retroactive Adjustments



- In the future, TIPS will allow Tribal Employers to create SF 2809s/SF 2810s with effective dates in the past
- Retroactive adjustments will be allowed for the following transactions:
 - Initial enrollments (SF 2809)
 - Enrollment code changes (SF 2809)
 - Cancellations (SF 2809)
 - Reinstatements (SF 2810)
 - Terminations (SF 2810)
 - Billing Unit/POI transfers

Retroactive Adjustments (contd.)



- The following considerations will need to be acknowledged by the Tribal Employer before completing a retroactive adjustment:
 - Retroactive adjustments resulting in either net credits or net debits will be displayed in the monthly Billing Report under the "Adjustments" column

TOW YOU THEAT LITED VET S DITING REPORT WITHE ATTELLED BY RELIDALINE AUJUSTITET

Adjustment resulting in net credit (+)	Net credits will be applied to future bills until the adjustment's balance is reduced to \$0
Adjustment resulting in net debit (-)	Net debits will be applied in total to monthly bill in which the retroactive adjustment is entered into TIPS

PLEASE NOTE: This functionality is not currently available; a customer notification will be released when the functionality is released. Please forward any relevant requests to the TIPS Contact Center: 1-855-NFC-4GOV



- 1. What information must you have in order to transfer an enrollee to a Billing Unit/POI managed by your Tribal Employer
 - First Name
 - Last Name
 - Social Security Number
- 2. Court ordered indicators will prevent enrollment records from:
 - Voluntarily being cancelled via a new SF 2809
 - Being Switched from a *Self & Family Plan* to a *Self Only Plan*
- 3. True or False: Retroactive adjustments resulting in a net credit will result in a refund to your Tribal Employer's bank account
 - False

Lesson 4 Summary



- Now that you have completed this lesson, you should be able to:
 - Explain the Enrollee Billing Unit/POI Transfer processes
 - Understand the implications of adding a court ordered indicator to an employee's enrollment records
 - List the TIPS transactions that may be processed retroactively

Lesson 5: Performing Transactions in TIPS



Lesson 1: FEHB Overview	30 minutes
Lesson 2: TIPS and Enrollments	45 minutes
Break	10 minutes
Lesson 3: Billing and TIPS Reports	45 minutes
Morning Review	20 minutes
Lunch	60 minutes
Lesson 4: Special Transactions	30 minutes
Lesson 5: Performing Transactions in TIPS	90 minutes
Break	10 minutes
Lesson 6: Obtaining Additional Assistance	30 minutes
TIPS Transactions References	10 minutes
Final Review and Evaluation	35 minutes

Lesson 5 Objectives



- By the end of this lesson, you should be able to:
 - Access TIPS
 - Navigate TIPS
 - Perform enrollment transactions
 - Prepare TIPS Reports
 - Review your Billing Report in TIPS

How to Access TIPS



- Internet access is required to access TIPS
- Only authorized users can access TIPS
- A Tribal Employer's TSO is responsible for initiating and managing the creation of TIPS user accounts
- After the TSO sets up the Tribal Employer's account, NFC will email users their username and their TSO will provide those individuals with a temporary password

For the purposes of this training you will have access to a training account. This training account will expire after today's session

Government Disclaimer



Every time you log in to TIPS, you must accept the standard USDA system disclaimer

WARNING!

You are accessing a U.S. Government information system, which includes (1) this computer, (2) this computer network, (3) all computers connected to this network, and (4) all devices and storage media attached to this network or to a computer on this network. This information system is provided for U.S. Government-authorized use only.

Unauthorized or improper use of this system may result in disciplinary action, as well as civil and criminal penalties.

By using this information system, you understand and consent to the following:

You have no reasonable expectation of privacy regarding any communications or data transiting or stored on this information system. At any time, the government may for any lawful government purpose monitor, intercept, search and seize any communication or data transiting or stored on this information system.

Any communications or data transiting or stored on this information system may be disclosed or used for any lawful government purpose.

Your consent is final and irrevocable. You may not rely on any statements or informal policies purporting to provide you with any expectation of privacy regarding communications on this system, whether oral or written, by your supervisor or any other official, except USDA's Chief Information Officer.





How to Log in to TIPS



• Enter username and password in the Log In section



• TIPS is broken up into six main areas:

- Home Admin
- Inquiry Information
- Forms

Reports

TIPS	TRIE	BAL INS	URAN	CE PROCESSING SYSTEM	
HOME	INQUIRY	FORMS	ADMIN	INFORMATION	Welcome, John Knight ROLE: Update/NFC [Logout]
Enrollees by T O I C Ne Dis Total Enr Open S Open S Re Reason Effec Family	Reports nbe. State. Age Bands. and Plan R Total Enrollees Report rerall New Enrollees Report otal Disenrollment Report outact Information Report w Enrollees by Tribe Report lees Each Period By Tribe Report lees Each Period By Tribe Report leason Changes By Plan Report leason Changes By Plan Report asson for Plan Switch Report for Plan Switch Report for Plan Switch Report Relationships by Tribe Report Diverall 2809/2810 Report Billing Report	<u>Leport</u>			
				Home OPM	



Navigating TIPS: Main Page

Navigating TIPS: Inquiry



- The Inquiry tab allows users to:
 - Search for an employee enrolled in TIPS by name and/or Social Security Number / Unique Identifier
 - Search for active, inactive, terminated and cancelled enrollees
 - See submitted SF 2809s and SF 2810s
 - Edit SF 2809s and SF 2810s that have been saved but not submitted
 - Create SF 2810s

HOME	INQUIRY	FORMS	ADMIN	INFORMATION		Welcome, John Knight ROLE: Update/NFC [<u>Logout</u>]
Enrollee Se	arch Form					
Enrollee Information						
		Last N	íame Christman			
		First N	ame Lloyd			
		Middle N	ame			
		Social Security Nun	nber 555555555			
		Date of B	Birth 08/17/1988			
		Т	ribe Dire Wolf Tribe		•	
			POI Wolfman			
				Search		

Navigating TIPS: Forms



- The Forms tab allows users to:
 - Create a new SF 2809
 - Perform an Electronic Upload
 - Includes SF 2809s and SF 2810s



Navigating TIPS: Admin



- The Admin tab allows users to:
 - Manage Contacts
 - Chief Executive Officer, Chief Financial Officer, Tribal Benefits Officer(s) (TBO), and Maintenance Contact(s)
 - Unable to update Tribal Security Officer (TSO) information

TIPS	TRII	BAL IN	SURANC	E PROC	ESSING	SYSTEM	
HOME	INQUIRY	FORMS	ADMIN	INFORMATION			Welcome, Update Contact: ROLE: Update/Tribal/C [Logout
	Reports		Manage Contacts				
Enrollees by Total B	Tribe, Stage, Age Bands, and Enrollees by Reporting Period	Plan					
	Contact Information						
Total E	Disenrollments by Tribe						
Oper	1 Season Changes By Tribe						
Rea:	on for Plan Switch by Tribe fective Date of Coverage						
Eamily	Relationship Report By Tribe						
	Billing Report Sample						
			Ho	me <u>OPM Site Map</u>			

Navigating TIPS: Information



- The Information tab allows users to:
 - Manage contact information
 - Manage account information



Navigating TIPS: Reports



- The Reports menu allows users to:
 - Nine different TIPS Reports
 - Preview and Final Billing Report

TIPS	TRIB	AL INS	URANCE	PROCESSING SYSTEM	
HOME	INQUIRY	FORMS	INFORMATION		Welcome, Virgil Grambley ROLE: Update/Tribal [Logout]
Enrollees by Total E Total E Total E Oper Reas E Eamily C	Reports Tribe, Stage, Age Bands, and P inrollees by Reporting Period Contact Information Vew Enrollees by Tribe Disenrollments by Tribe iseason Changes By Tribe on for Plan Switch by Tribe Relationship Report By Tribe Relationship Report Billing Report Sample	'lan			
			Home OP	<u>M Site Map</u>	

Navigating TIPS: User Information



 User name and your level of system access are displayed in the upper right hand corner of all TIPS pages



Remember to always logout after you have finished using TIPS!

Types of Transactions in TIPS

- THE REAL PROCESSING
- Transactions may be initiated using the SF 2809, SF 2810 or an Electronic Upload
- Available transactions include:
 - Initial enrollment
 - Enrollment change
 - Change of name
 - Change of address
 - Enrollment cancellation
 - Enrollment termination

- Enrollment reinstatement
- Billing Unit/POI transfer process
- Info only 2809
- Court ordered indicator
- Retroactive adjustments

Individual Forms vs. Electronic Upload



	Individual Forms	Electronic Upload
Definition	 Enter all enrollee information into TIPS, one record at a time 	 Upload multiple records at the same time
Pros	 Simpler when performing a few transactions Easier to identify and correct errors 	 Saves time when performing multiple transactions Decreases the risk of manual error in TIPS
Cons	 Time consuming when performing more than a few transactions Increases risk of manual error in TIPS 	 Errors in Electronic Uploads must be resolved individually Must adhere to a strict Electronic Upload format

Selecting a Tribal Employer and Billing Unit/POI



- Before entering data in a SF 2809 or SF 2810 remember to:
 - Confirm that the correct Tribal Employer is selected
 - Select the appropriate Tribal Employer Billing Unit/POI for the Tribal Employee

TIPS	TRIB	AL INS	URANCE F	PROCESS	ING	SYSTEM	
HOME	INQUIRY	FORMS	INFORMATION				Welcome, Virgil Grambley ROLE: Update/Tribal [Logout]
Health	Benefits Ele	ection F	orm (2809)				
Tribal HR SF2809 Ir	formation			Pot			
A Test Tribe		+		РОГ	-		SF2809 Status: New
Part A - Enrollee In	formation (For additional family n	nembers, use the Part	A (Continued) section below.)				
Enrollee First Name		Mi	Idle Name		Last Name		

Entering Enrollment Data



- When entering data in SF 2809s and SF 2810s users:
 - Can tab from field to field to quickly enter data
 - Must complete free response fields, select radio buttons, and mark check boxes
 - Must use the box for enrollee information located at the bottom of SF 2809s in order to add family members
 - Must have contact information for Tribal Employers representatives in order to complete these forms

Finalizing a SF 2809 or SF 2810



 For any new SF 2809 or SF 2810 users may select one of four options:

Option	Description
Cancel	Deletes the draft form and returns user to the main page
Clear	Deletes all data in the draft form without leaving the form
Save	Saves the draft form and allows for additional edits at a later date before submission to a FEHB Plan Carrier
Submit	Finalizes the form and sends it to the appropriate FEHB Plan Carrier





- After users select Submit, the form will be submitted to the appropriate FEHB Plan Carrier
- If users notice an error or need to stop a form after submitting, the form can be held, if it has not been processed on the Billing Report
 - By holding a form, the enrollment/enrollment changes on the held form will not be reflected on the Billing Report
 - Users will be able to make changes to a held form
 - Once users have finished revising the held form, select Submit again to send it to the FEHB Plan Carrier






• The top right corner of the form displays the status of the SF 2809 and SF 2810

Health Benefits Elect	ion Form (2809)		
Tribal HR SF2809 Information			
Tribe		POI	SE2809 Status:
TEST TRIBE		•	New

• SF 2809s and SF 2810s can have the following statuses:

Status	Description
New	New form, not saved or submitted
Saved	Partially filled out form, not yet submitted
Submitted and Released	Form has been completed and sent to FEHB Plan Carriers
Held	Form has been taken out of the queue for and will not be sent to the FEHB Plan Carrier or reflected on the Billing Report
Processed	Form has been sent to FEHB Plan Carriers and processed for billing and cannot be held



- If users attempt to submit a SF 2809 or SF 2810 with errors, TIPS will not accept the form
- TIPS will list errors in red text underneath each field
- Please correct any errors before submitting again

TIPS	TRIB	AL INS	URANCE	PROCESS	ING SYSTEM		
HOME	INQUIRY	FORMS	INFORMATION			Welcome, Virgil Grambley ROLE: Update/Tribal [Logout]	
Health	Health Benefits Election Form (2809)						
Tribal HR SF2809 In	formation		POL				
Tribe A Test Tribe			A POI is	✓ Value mu required.	ist not be blank.	SF2809 Status: New	
Part A - Enrollee In	formation (For additional family	members, use the Part A	A (Continued) section below.)				
Enrollee First Name		Mide	dle Name		Last Name		
Value must not be bl	ank.				Value must not be blank.		
Home/Work Phone N	lumber	Soci	ial Security Number		Date of birth		
Phone number is not	valid.	Valu	ie must not be blank.		Value must not be blank.		

Resolving Electronic Upload Errors



- If TIPS identifies an error(s) after submission of an Electronic Upload, users will receive an email notifying them to log in to TIPS to retrieve and resolve any errors
- All pending errors must be resolved individually in TIPS even if they were originally submitted as part of an Electronic Upload file

Double-check forms! Resolving an error before submission is always easier than afterwards!

Generating a TIPS Report



- When preparing a TIPS Report, remember to select:
 - Billing Unit/POI
 - Start Date
 - End Date
- Tribal Organization will be prepopulated

TIPS	TRIBAL IN	SURAN	CE PROCES	SSING SYSTEM	
HOME	INQUIRY	FORMS I	NFORMATION		Welcome, Virgil Grambley ROLE: Update/Tribe [Logout]
Disenrollment Repor	t				
Tribal Organization:	All Available 🔻	POI:	All Available 🔻	Generate Report	
Start Date:	3/25/2012	End Date:	3/25/2012		
			Home OPM		

Viewing a Billing Report



- Billing Reports can be prepared from the TIPS main page
- Depending on the user's role, access to may be granted to view Billing Reports for one or more Tribal Employer Billing Unit/POIs
- Billing Reports are automatically updated throughout the month and reflect all SF 2809s/SF 2810s that have been submitted and processed

TIPS	TR	IBALI	INS	URANCE	E PROC	CESSING	S SYSTEM	
HOME	INQUIRY	FOF	RMS	INFORMATION	l			Welcome, Virgil Grambley ROLE: Update/Tribal [Logout]
Billing Repor	t							
Tribal Organization:	A	All Available 🛛 👻		POI:	1115 🔹		Generate Report	
Billing Period:	C	Current Month 🛛 👻						
				Home (OPM Site Map			

Walkthroughs and Exercises



- This section of the training will focus on practicing and performing the following transactions in TIPS:
 - Individual Enrollment
 - Updating a Saved Enrollment
 - Holding, Updating, and Submitting an Enrollment
 - Updating a SF 2809 for Open Season
 - Enrollment Termination
 - Preparing a Billing Report
 - Overall SF 2809/SF 2810 Report

How to Access TIPS Training Environment

- Follow these steps to access the TIPS Training Environment:
 - Open a web browser on your computer
 - Enter the URL provided to you on your user information handout
 - Refer to your user information handout for:
 - Temporary User ID
 - Temporary Password
 - Additional exercise information

At a later date, users will receive a permanent TIPS username from NFC and a temporary password from their Tribal Employer's TSO

Exercise 5.1: Individual Enrollment



- Create a new enrollment in TIPS using the information found in the Exercise 5.1 materials
- Instead of submitting the enrollment form when finished, select Save -NOT- Submit
- Refer to the handout with your login information for your Social Security Number



Exercise 5.2: Updating a Saved Enrollment



- Perform an inquiry for the SF 2809 you created in Exercise 5.1
- Update the SF 2809 in TIPS using the information found in your Exercise 5.2 materials
- **Submit** the SF 2809
- Refer to the handout with your login information for you and your spouse's Social Security Number



Exercise 5.3: Holding, Updating, and Submitting an Enrollment

THERE HAVE PROCESSING

- Perform an inquiry for the SF 2809 you updated in Exercise 5.2
- Hold the SF 2809 you updated in Exercise 5.2
- The Enrollee's date of birth was entered incorrectly.
 Update the birthday to read 03/01/1970
- Submit the updated SF 2809



Exercise 5.4: Updating a SF 2809 for Open Season

- Search for your assigned enrollee in TIPS using the information found in your Exercise 5.4 materials
- Update SF 2809 based on Exercise 5.4 materials
- Submit the updated SF 2809

HOME	INQUIRY FORM	S INFORMATION			Welcome, Virgil Grambley ROLE: Update/Tribal [Logouf]
Health Ber	nefits Election	i Form (2809)			
Tribe A Test Tribe	n 		POI		SF2809 Status:
Part A - Enrollee Information Enrollee First Name	For additional family members, use th	e Part A (Continued) section below.) Middle Name	Last Name		
Home/Work Phone Number		Social Security Number	Date of birth		
Sex Are you Male Female Yes	married? Home mailing address	Addr	ess Line 2	City	State Zip
Medicare (See note - page 2)	Medicare Claim Number	Are you covered by insurance other th Medicare?	an Indicate other types of insurance Name of i	nsurance	Policy no.
Part B - Present Plan	2 Envelopent code	Part C - New Plan	Tricare FEHB Other		
Part D - Event Code	2. Elitoriteric cour	1.7 107 1001	Part F - Cancella	tion	
1. Event code Part I - To be completed by	2. Date of event agency or retirement system	Premium Conversion	CANCEL my	enrollment.	
REMARKS	a fill also data data in	. Provide la deservation			
5. Authorizing official	2. Effective date of action	7. Payroll office contact	8. Payroll telephone number	ency or retirement system	
Part A - Enrollee Informatio	6. Payroll office number 14050000 on Continued; Family Members				
Add Family Members First Name	Middle Name	Last Name	Social Security Number	Date of birth	
Sex Are you Male Female Yes	Mome mailing address	Addr	ess Line 2	City	State Zip
Martinara (Saa nota - nava 2)	Madicara Claim Number	Are you covered by insurance other th Medicare?	han Indicate other types of		Patru na
A B D		C Yes C No	Tricare FEHB Other		Add Morehov
Helacionship Type.	Family Memb	ers Entered	rrently Entered	I	ALCONTACT.
		Cancel Clear	Save Submit		
(-		Home OPM Site	a Map		
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Exercise 5.5: Enrollment Termination

- Terminate your assigned enrollee in TIPS using the information found in your Exercise 5.5 materials
- Refer to the handout with your login information for your enrollee's Social Security Number





Exercise 5.6: Preparing a Billing Report

- Run a Billing Report in TIPS on your Billing Unit / POI for 6/1/2012
- **Export** the report to Excel and save to your desktop
- Open the report and review



RANCE PROCES

Exercise 5.7: Overall SF 2809/SF 2810 Report

- Generate an Overall SF 2809/SF 2810 TIPS Report for your Tribal Employer Billing Unit/POI
- Export the report to Excel and save to your desktop
- Open the report and review



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Lesson 5 Summary



- Now that you have completed this lesson, you should be able to:
 - Access TIPS
 - Navigate TIPS
 - Perform enrollment transactions
 - Prepare TIPS Reports
 - Review your Billing Report in TIPS



Break – 10 Minutes

Lesson 6: Obtaining Additional Assistance



Lesson 1: FEHB Overview	30 minutes
Lesson 2: TIPS and Enrollments	45 minutes
Break	10 minutes
Lesson 3: Billing and TIPS Reports	45 minutes
Morning Review	20 minutes
Lunch	60 minutes
Lesson 4: Special Transactions	30 minutes
Lesson 5: Performing Transactions in TIPS	90 minutes
Break	10 minutes
Lesson 6: Obtaining Additional Assistance	30 minutes
TIPS Transactions References	10 minutes
Final Review and Evaluation	35 minutes



- By the end of this lesson, you should be able to:
 - Describe the standard Tribal Employer inquiries
 - Demonstrate an understanding of the types of inquiries handled by NFC and other external organizations
 - Demonstrate how to navigate the TIPS website
 - Submit an inquiry using the Remedy Requester Console

Standard Inquiries

- Standard inquiries from Tribal Employers may include:
 - How do I complete a SF 2809 or SF 2810?
 - How do I generate a TIPS Report or Billing Report?
 - I received an error message in TIPS, how do I correct this error?
 - What prescriptions are covered under this FEHB plan?





Inquiries Handled by NFC Contact Center and Other Organizations



NFC Contact Other Organizations Center **Types of Inquiries: Tribal Employers OPM Employee-specific** • General program inquiries **Policy Inquiries** inquiries Inquiries regarding completing a SF 2809/ SF 2810 **FEHB Plan Carriers** Assistance with Electronic **Tribal Security Officer** Upload errors **TIPS Username Setup Call Centers** Assistance with generating and Security Inquiries **Coverage Inquiries** a TIPS Report

The TIPS Contact Center can be reached at: 855-NFC-4GOV



• Billing and technical

Billing discrepancies

the TIPS website

Assistance with navigating

inquiries

OPM Tribal Desk can be reached at: 202-606-2530

Tribal Insurance Processing System (TIPS) Detailed Inquiry Guide



• The detailed guide outlines the points of contact that will be responsible for resolving the Tribal Employers' TIPS inquiries

Inquiry Type	Example Inquiries	Who To Contact
<i>Implementation Inquiries</i> Includes questions related to setting up Tribal Employers in TIPS.	 Confirming receipt of Authorized Contact Designation Forms or other parts of the OPM Agreement Package 	NFC Client Management Branch tips@nfc.usda.gov
Processing, Technical and Billing Inquiries Includes questions associated with performing core system activities in TIPS.	 Entering a 2809 or 2810 Generating reports in TIPS Locating a Tribal Employee in TIPS Questions regarding account balance Screen will not load in TIPS 	TIPS Contact Center 1-855-NFC-4GOV (632-4468) <u>http://tips.nfc.usda.gov</u>
TIPS Access Inquiries Includes questions related to the steps necessary for establishing TSOs or modifying User IDs (for TSOs).	 Establishing or modifying TIPS TSOs and User IDs Assigning User ID roles 	 NFC Security Office - To create or delete a User ID, or to add or remove access to/from an existing User ID, submit Security Access Requests to: 1-888-245-4060 (fax) or nfc.securityofc@nfc.usda.gov NFC Operations Security Center - Submit technical access inquiries to: 1-800-767-9641 (phone) or osc.etix@nfc.usda.gov Submit TSO general inquiries and training requests to: nfc.aso@nfc.usda.gov
TIPS Training Inquiries Includes questions related to the coordination and delivery of regional training to Tribal Employers.	Confirming that NFC will be able to deliver TIPS system training in a specific location	NFC Training and Communications Branch nfc.training@usda.gov
Program and Policy Inquiries Includes questions related to eligibility and general program information.	 Determining if eligible to participate in FEHB Requesting an FEHB Agreement Package or program training 	U.S. Office Personnel Management 1-202-606-2530 or <u>TribalPrograms@opm.gov</u>
<i>Carrier Specific Inquiries</i> Includes questions about the specific plans.	 To change an enrolled employee's address or add a family member under an already existing family enrollment 	Contact the specific FEHB Plan for information.

Exercise 6.1: Resolving Inquiries

- This exercise will test your knowledge of who is the appropriate contact for different types of inquiries
- The facilitator will read aloud ten inquiries
 - Identify who you should call to resolve each inquiry
 - Write your answer in your participant guide





Submitting Inquiries Online



- TBOs and other Authorized Contacts may submit inquiries online using the Remedy Requester Console
 - To add Authorized Contacts please call the TIPS Contact Center
- Links to the Remedy Requester Console are available:
 - On the TIPS website
 - Inside TIPS on the Help page under the Information tab
- In order to access the Remedy Requester Console you will receive a username and password from NFC

Your TIPS login is independent from your Remedy Requester Console login





 Additional information can also be found on the TIPS website at <u>https://tips.nfc.usda.gov</u>



About the Remedy Requester Console



- Remedy Requester Console allows Tribal Employers to:
 - Submit new requests
 - Specify urgency and the date by which a solution is needed
 - Specify the nature of their requests for quicker resolution
 - Attach files related to their requests
 - View the status of their requests

📑 Request (EAGLE-D)					×
 bmc software					<u>Help</u>
New Request					
Just a few easy steps is	s all it takes to find a solution or rec	quest additional help.			
Request Details	5		Requested By		
Summary*+		•	Company	USDA-0CF0-NFC	
Notes			First Name	Judy	
			Middle Name	L	
			Last Name	Andre	
			Phone	1 504 426-1435	
Urgency*	3-Medium	-	Email	judy.andre@nfc.usda.gov	
Date Required+	,		Organization	GESD	
	Add Attachment		Department	POD-PEPB	
Save Close					

Creating a Request in Remedy



1. Open the Remedy web portal and log in with username

National Finance Ce	nter	×	1	15	
	Please log in. User Name				
	Password Lo	g In Clear			
		<u> </u>			



MC Remedy User - [Home Page (Search)]	
BMC Remedy AR System	Loquut Software
Welcome N/F794 Quick Links Search Incident Archives Approval Central Chores Resourced	
Administrator Console Application Administration Console AR System Sample Application AR Sample Application Console Asset Management Asset Management	
BMC Atrium Configuration Management Database CMDB Console Definitive Software Library Definitive Software Library Definitive Software Library Console Foundation Elements	
Overview Console Incident Management Incident Management Problem Management Problem Management Problem Console Requester Console	
	NF794 EAGLE-D



3. Once in the Requester Console select the Create a New Request button located at the top of the page

BMC Remedy User - [Requ	uester Console (New)] tiops Window Help				<u>_ 문 ×</u>
					<u></u>
Usba United States Dep National Fin	artment of Agriculture nance Center	10			Help
✓ View Requests	My Console				Refresh
Open	Welcome to the IT Rec	uester Console			
All General Functions 	Use this Requester Console The My Requests table disp	to submit requests to IT. plays the requests you have submitted.			
	Create a New Request]			
	My Requests				
	Request ID	Summary Error Message	Status	Submit Date	Urgency
	Request Details				
	Assignee	Judy L Andre	Notes	Test - Culp P0099 report issue	
	Category Tier 1	Service	1		
	Category Tier 2	Request]		
	Category Tier 3		1		
	Product Name+				
	View Cano	el Reopen			Close
No matching table items found				NF794	EAGLE-D



4. Describe the type of inquiry, additional information about the inquiry, its urgency, the required date of resolution, and your contact information

📄 Request (EAGLE-D)		×
 bmcsoftware		<u>Help</u>
New Request		
Just a few easy steps is all it takes to find a solution or request additional help.		
Request Details	Requested By	
Summary*+	Company USDA-OCFO-NFC	
Notes	First Name Judy	
	Middle Name L	
	Last Name Andre	
	Phone 1 504 426-1435	
Urgency* 3-Medium	Email judy.andre@nfc.usda.gov	
Date Required+	Organization GESD	
Add Attachment	Department POD-PEPB	
Save Close		

5.	Click	Save

📑 Request (EAGLE-D)				×
 bmcsoftware				<u>Help</u>
New Request	t			
Just a few easy steps	is all it takes to find a solution or request additional help.			
Request Detail	s	Requested By		
Summary*+		Company	USDA-OCFO-NFC	
Notes		First Name	Judy	
		Middle Name	L	
		Last Name	Andre	
		Phone	1 504 426-1435	
Urgency*	3-Medium	Email	judy.andre@nfc.usda.gov	
Date Required+		Organization	GESD	
	Add Attachment	Department	POD-PEPB	
Save Close				





BMC Remedy User - [Requ	uester Console (New)]				
					_ <u>_</u> <u>_</u> <u>_</u> <u>_</u> <u>_</u>
United States Dep National Fin	eartment of Agriculture	T			Help
▼ View Requests	My Console				Refresh
Open	Welcome to the IT Re	quester Console			
All General Functions	Use this Requester Consol The My Requests table dis	e to submit requests to IT. plays the requests you have submitted.			
	Create a New Request	l			
	My Requests				
	Request ID INC000000234374	Summary Error Message	Statu Close	s Submit Date	Urgency 3-Medium
	INC00000000492	NUMBER IN OUTLOOK INCORRECT	Close	ed 11/24/2009 9:54:13 AM	4-Low
	Request Details				
	Assignee	Judy L Andre	Notes	Test - Culp P0099 report issue	
	Category Tier 1	Service			
	Category Tier 2	Request			
	Category Tier 3				
	Product Name+				
	View	cel Reopen			Close
No matching table items found				NF794	EAGLE-D

Incident Statuses



 Once a request is submitted in Remedy, it becomes an Incident and is assigned on these statuses:

Incident Status	Description
New	Requested but not yet been assigned
Pending	Required info/hardware/software/documentation is necessary
Assigned	Assigned to a group for resolution
In Progress	Assigned to an individual and is being worked on
Resolved	Completed
Canceled	Canceled by the Requester
Closed	Closed and is no longer active



- Who can resolve inquiries regarding coverage plans?
 FEHB Plan Carrier Call Centers
- 2. Who can resolve billing and technical inquiries?
 - NFC Contact Center
- 3. Who can assist with inquiries regarding navigation of the TIPS system?
 - NFC Contact Center
- 4. Who can resolve questions regarding policy inquiries?
 OPM
- 5. Who can resolve inquiries regarding TIPS Username Setup and Security Inquiries
 - Your Tribal Security Officer

Lesson 6 Summary



- Now that you have completed this lesson, you should be able to:
 - Describe the standard Tribal Employer inquiries
 - Demonstrate an understanding of the types of inquiries handled by NFC and other external organizations
 - Demonstrate how to navigate the TIPS website
 - Submit an inquiry using the Remedy Requester Console

TIPS Transactions References



Lesson 1: FEHB Overview	30 minutes
Lesson 2: TIPS and Enrollments	45 minutes
Break	10 minutes
Lesson 3: Billing and TIPS Reports	45 minutes
Morning Review	20 minutes
Lunch	60 minutes
Lesson 4: Special Transactions	30 minutes
Lesson 5: Performing Transactions in TIPS	90 minutes
Break	10 minutes
Lesson 6: Obtaining Additional Assistance	30 minutes
TIPS Transactions References	10 minutes
Final Review and Evaluation	35 minutes

TIPS Transactions References

- THER. HAUCE PROCESSING
- Instructions on completing the TIPS activities listed below can be found in the Participant Guide:
 - Creating new SF 2809s in TIPS
 - Creating SF 2810s in TIPS
 - Electronic Upload Process
 - Managing Contacts in TIPS
 - Billing Functionality Guide
Final Review and Evaluation



Lesson 1: FEHB Overview	30 minutes
Lesson 2: TIPS and Enrollments	45 minutes
Break	10 minutes
Lesson 3: Billing and TIPS Reports	45 minutes
Morning Review	20 minutes
Lunch	60 minutes
Lesson 4: Special Transactions	30 minutes
Lesson 5: Performing Transactions in TIPS	90 minutes
Break	10 minutes
Lesson 6: Obtaining Additional Assistance	30 minutes
TIPS Transactions References	10 minutes
Final Review and Evaluation	35 minutes

- The class will be asked a series of 15 questions that cover all material reviewed today
- Once the facilitator has finished reading each statement
 - Raise your hand if you know the correct answer





Final Review



In addition to the CEO and CFO, what three contacts must Tribal employers designate when joining FEHB?

Tribal Benefits Officer, Tribal Security Officer, and Authorized Maintenance Contact



What process enables you to upload multiple enrollment records or at the same time?

Electronic Upload process



What are the four primary functions of TIPS?

- 1. Enrollments
- 2. Billing Reports
- 3. TIPS Reports
- 4. Special Transactions



Each ______ will receive a separate Billing Report in TIPS.

Tribal Employer Billing Unit/POI



The Final Billing Report closes at this time each month.

11:59 PM MST on the last calendar day of the month



_____ will contact Tribal Employers if they are billed and insufficient funds are available in their account.

OPM



TIPS Reports can be viewed in either _____ or _____.

The TIPS Web Portal (Online) or in Microsoft Excel



Who is responsible for initiating and managing the creation of a Tribal Employer's TIPS user accounts?

Tribal Security Officer (TSO)



In TIPS, which tab would you select in order to Create an initial 2809?



Forms



In TIPS, which tab would you select in order to Create a 2810?



Inquiry



What is the status of a SF 2809 that has been completed and sent to the FEHB Plan Carriers, but not processed for billing?

Submitted and Released



What button would a TIPS user select to edit an incorrect SF 2809 that has already been Submitted and Released but not Processed?

The "Hold" button



What fields can you search by when performing an Inquiry in TIPS?

Name (first, middle, and last) and Social Security Number



What TIPS Report allows you to see source data from all Tribal Employee forms?

Overall 2809/2810 Report



What information must you have in order to transfer an enrollee to a POI managed by your Tribal Employer

First Name, Last Name, Social Security Number



What is the TIPS NFC website URL?

https://tips.nfc.usda.gov

Course Summary



- Now that you have completed this course, you should be able to:
 - Describe the FEHB key stakeholders relative to TIPS
 - Identify how TIPS supports Tribal Employers
 - Explain the employee enrollment process
 - Explain the billing and payment processes
 - Enroll employees in TIPS using individual forms and Electronic Uploads
 - Run and review TIPS Reports and Billing Reports in TIPS
 - Describe special transactions including: Billing Unit/POI Transfers, Retroactive Adjustments, and Court Orders
 - Demonstrate how to navigate the TIPS website
 - Submit an inquiry using the Remedy Requester Console

Evaluation







Thank you!