# Table of Contents

Course Objectives.......................................................................................................................... 4  
Lesson 1: FEHB Overview ............................................................................................................. 5  
Lesson 2: TIPS and Enrollments ................................................................................................. 13  
Lesson 3: Billing and TIPS Reports ............................................................................................... 37  
Lesson 4: Special Transactions .................................................................................................... 47  
Lesson 5: Performing Transactions in TIPS .................................................................................. 55  
Lesson 6: Obtaining Additional Assistance .................................................................................. 77  
TIPS Transactions References ..................................................................................................... 87  
Appendix A: Glossary ................................................................................................................... 113  
TIPS Final Review ....................................................................................................................... 114  
Course Summary .......................................................................................................................... 116
Course Objectives

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 ServiceNow Customer Service Portal.
Lesson 1 Objectives: FEHB Overview
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.

About NFC: Background
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
What is FEHB?

- Provides employer-sponsored health insurance to Federal employees.
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
The diagram below displays the FEHB key stakeholders and how they interact with each other:

Key Stakeholders
There are five Key Stakeholders for FEHB:

– Tribal Employees
– Tribal Employers
– National Finance Center (NFC)
– Office of Personnel Management (OPM)
– FEHB Plan Carriers

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.
Tribal Employers responsibilities include:

- 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 to NFC.
- Work with NFC to facilitate enrollment reconciliations.

NFC responsibilities include:

- Maintain TIPS and provides 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.
- Provide security training.

OPM responsibilities include:

- 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 Units/POIs.

FEHB Plan Carriers responsibilities include:

- 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**

Outlined below are the 5 Steps Tribal Employers will need to complete in order to access TIPS and be successfully implemented into FEHB.
FEHB Agreement Package Completion
Tribal Employer must complete and return the initial documents OPM sent, including:

- a. Agreement to Purchase FEHB
- b. Tribal Employer Profile
- c. DPRS Memorandum of Understanding (MOU)
- d. Bank Account Information Form
- e. Authorized Contact Designation Forms (description of each listed below)

<table>
<thead>
<tr>
<th>Authorized Contact</th>
<th>Function</th>
<th>Number of Contacts Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tribal Executive</td>
<td>• Signs the Agreement to purchase FEHB sent by OPM.</td>
<td>1 per Tribal Employer</td>
</tr>
<tr>
<td></td>
<td>• Approves Tribal Benefits Officer (TBO) and TIPS Security Officer (TSO) roles.</td>
<td></td>
</tr>
<tr>
<td>Chief Financial Officer</td>
<td>• Manages Tribal Employer’s financial transactions.</td>
<td>1 per Tribal Employer</td>
</tr>
<tr>
<td></td>
<td>• Can approve TBO and TSO roles</td>
<td></td>
</tr>
<tr>
<td>Tribal Benefits Officer (TBO)</td>
<td>• Serves as the primary contact for Tribal Employees, OPM, NFC, and FEHB Plan Carriers.</td>
<td>1 per Tribal Employer</td>
</tr>
<tr>
<td></td>
<td>• Functions as the primary contact in case of non-payment of premiums.</td>
<td></td>
</tr>
<tr>
<td>TIPS Security Officer (TSO)</td>
<td>• Submits requests for and manages User IDs for Tribal Employer members accessing TIPS in SecureAll.</td>
<td>1 primary and a minimum of 1 secondary per Tribal Employer</td>
</tr>
<tr>
<td></td>
<td>• Resets passwords for Users locked out of TIPS.</td>
<td></td>
</tr>
<tr>
<td>Authorized Maintenance Contact</td>
<td>• Adds and updates contact information in TIPS for a Tribal Employer’s Authorized Contacts.</td>
<td>2 per Tribal Employer</td>
</tr>
</tbody>
</table>

*Note: One individual can fill multiple roles*
1. **OPM Agreement Package Verification**
   NFC and OPM will work together to verify the completion of a Tribal Employer’s agreement package from OPM. A NFC TIPS Operations representative (Tipsoperations@nfc.usda.gov) will contact the Tribal Benefits Officer with the required steps to establish the Tribal Employer’s authorized maintenance contacts, as well as let him/her know if the Tribal Employer’s agreement package is missing any required information.

2. **TIPS Security Officer Training**
   A NFC Access Management Branch (NFC Security) representative (NFC.SecurityOFC@nfc.usda.gov) will contact TSOs to arrange security training. Security training is required for all TSOs and typically will be delivered via a periodic online webinar.

3. **TIPS User ID Establishment**
   Once a Tribal Employer’s TSO has received security training from NFC, they must submit User ID requests to NFC for individuals who will access TIPS. NFC Security will create User IDs based on these requests. TIPS Security Officers may assign one of the following roles to each TIPS User:

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
<th>TIPS Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update/Tribe (e.g. Human Resources Staff)</td>
<td>Standard Tribal Employer User</td>
<td>• Can create/update enrollee SF 2809s and SF 2810s.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Can view/download TIPS Reports including TIPS Billing Reports.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Can submit Electronic Upload files.</td>
</tr>
<tr>
<td>Update/Tribe/C (e.g. Authorized Maintenance Contact)</td>
<td>Same as Update/Tribe role with addition of Authorized Contact record update access</td>
<td>• Can create/update enrollee SF 2809s, SF 2810s, and contact records (except TSO).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Can view/download TIPS Reports including TIPS Billing Reports.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Can submit Electronic Upload files.</td>
</tr>
<tr>
<td>Audit/Tribe (e.g. Finance Staff)</td>
<td>Same as Update/Tribe role but with read-only access to records</td>
<td>• Can view enrollee, SF 2809s and SF 2810s.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Can view/download TIPS Reports.</td>
</tr>
</tbody>
</table>
**For inquiries regarding this process, contact NFC Security, NFC.SecurityOFC@nfc.usda.gov.**

4. **Online Inquiry Submission Website (ServiceNow) Setup**
   A TIPS Contact Center representative will contact the TBO with the steps required to establish a Tribal Employer’s account for ServiceNow use. ServiceNow is an online inquiry submission website that lets TBOs submit inquiries or help desk requests to the TIPS Contact Center via the internet.

   **Please note that Service Now User IDs differ from TIPS User IDs.**

5. **TIPS Training (optional)**
   A NFC Training and Communications Branch (TCB) representative will contact Tribal Employers regarding regional TIPS training. It is strongly recommended that TIPS users attend TIPS training before accessing the system.
Lesson 1: Knowledge Check
1. Who are the five key FEHB stakeholders?

2. What is the name of the insurance system for Tribal Employers maintained by NFC?

3. What contact is responsible for entering enrollment and plan changes into TIPS?

4. What contact works with NFC to establish TIPS user identifications for the Tribal Employer?
Lesson 1 Summary: FEHB Overview

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 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.
Lesson 2 Objectives: TIPS and Enrollments
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)?
TIPS is:

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

The following section will provide an overview of the system and TIPS processes.
Functions of TIPS
There are four primary functions in TIPS:

- Submitting new Enrollments and Enrollment Changes
- Viewing Billing Reports
- Generating and downloading TIPS Reports
- Completing Special Transactions
What information do I need to submit enrollments in TIPS?

Enrollments are based on the SF 2809 and SF 2810:

**SF 2809 Overview**

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

<table>
<thead>
<tr>
<th>SF 2809 Paper Copy</th>
<th>SF 2809 in TIPS</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Enrollee and Family Member Information</td>
<td>A. Enrollee Information and Enrollee Information Continued: Family Members</td>
</tr>
<tr>
<td>B. FEHB Plan You Are Currently Enrolled In</td>
<td>B. FEHB Plan You Are Currently Enrolled In (If Applicable)</td>
</tr>
<tr>
<td>C. FEHB Plan You Are Enrolling In or Changing To</td>
<td>C. FEHB Plan You Are Enrolling In or Changing To</td>
</tr>
<tr>
<td>D. Event That Permits You To Enroll, Change, or Cancel</td>
<td>D. Event That Permits You To Enroll, Change, or Cancel</td>
</tr>
<tr>
<td>E. Election NOT to Enroll</td>
<td>E. Cancellation</td>
</tr>
<tr>
<td>F. Cancellation of FEHB</td>
<td>F. Remarks</td>
</tr>
<tr>
<td>G. Suspension of FEHB</td>
<td>G. To be completed by Tribal Employer</td>
</tr>
<tr>
<td>H. Remarks</td>
<td></td>
</tr>
<tr>
<td>I. To Be Completed By Agency or Retirement System</td>
<td></td>
</tr>
</tbody>
</table>

*Figure 2: SF 2809 & SF 2810*
SF 2809 in TIPS

Tribal HR SF 2809 Information
When completing a SF 2809 in TIPS begin by selecting a:

- Tribal Employer
- Billing Unit / POI
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)

<table>
<thead>
<tr>
<th>Enrollee First Name</th>
<th>Middle Name</th>
<th>Last Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Preferred Telephone Number</th>
<th>Social Security Number</th>
<th>Date of Birth (MM/DD/YYYY)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sex</th>
<th>Are you married?</th>
<th>Home mailing address</th>
<th>Address Line 2</th>
<th>City</th>
<th>State</th>
<th>Zip</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>○ Male ○ Female</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>○ Yes ○ No</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Medicare if you are covered?</th>
<th>Medicare Claim Number</th>
<th>Are you covered by insurance other than Medicare?</th>
<th>Indicate other types of insurance</th>
<th>Name of insurance</th>
<th>Policy no.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>○ Yes ○ No</td>
<td>○ Tricare ○ FEHB ○ Other</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Email Address</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

**Figure 5: Part A Enrollee Information**

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.

<table>
<thead>
<tr>
<th>Part B – FEHB Plan You Are Currently Enrolled In (If Applicable)</th>
<th>Part C – FEHB Plan You Are Enrolling In or Changing To</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Plan name</td>
<td>2. Enrollment code</td>
</tr>
<tr>
<td>TRIPLE S. SALUD</td>
<td>891</td>
</tr>
</tbody>
</table>

**Figure 6: Part B & C FEHB Plan**
What Are Enrollment Codes?
Enrollment codes are specific to:

- **Self Only Plans**
- **Self & Family Plans**
- **Self Plus One**

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**
- Codes ending in 3 and 6 refer to **Self Plus One Plans**

<table>
<thead>
<tr>
<th>Self</th>
<th>Self &amp; Family</th>
<th>Self Plus One</th>
</tr>
</thead>
<tbody>
<tr>
<td>224</td>
<td>225</td>
<td>226</td>
</tr>
<tr>
<td>JN1</td>
<td>JN2</td>
<td>JN3</td>
</tr>
<tr>
<td>JN4</td>
<td>JN5</td>
<td>JN6</td>
</tr>
<tr>
<td>471</td>
<td>472</td>
<td>473</td>
</tr>
<tr>
<td>474</td>
<td>475</td>
<td>476</td>
</tr>
<tr>
<td>111</td>
<td>112</td>
<td>113</td>
</tr>
<tr>
<td>104</td>
<td>105</td>
<td>106</td>
</tr>
<tr>
<td>2G1</td>
<td>2G2</td>
<td>2G3</td>
</tr>
<tr>
<td>2G4</td>
<td>2G5</td>
<td>2G6</td>
</tr>
<tr>
<td>421</td>
<td>422</td>
<td>423</td>
</tr>
</tbody>
</table>

A list of enrollment codes is available in the paper SF 2809 on OPM’s website.
Part D – Event That Permits You to Enroll, Change, or Cancel

Enter Tribal Employee’s:

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

- Select a Date of Event:
  - The date an employee becomes eligible for enrollment, change of coverage, or cancellation as defined by the event code

- The event code chart (found on following page) governs date windows in which changes of coverage are allowed with corresponding QLEs. The TIPS system validates date of event, date received and effective date of action fields based upon OPM's guidelines.

- Check Premium Conversion if Tribal Employee participates.
  - The Premium Conversion box must be checked for Series 1 event codes.
  - If an employee’s Billing Unit/ POI does not participate in premium conversion, the employee will be unable to check the Premium Conversion box.

A list of event codes can be found on OPM’s website.
Part F – Cancellation
In order to submit a SF 2809 for cancellation, check the box in part F.

- Enrollees in premium conversion may only cancel following a valid event.

- Cancellations can only be effective retroactively or in the current month. The only exception is Open Season Cancellations with QLEs 1B and 5B. Open Season Cancellations must be effective 12/31 of that year.

- 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 employee is not participating in premium conversion.

---

**Figure 8: Part F Cancellation**

Part I – To be completed by Tribal Employer
Enter:

- Date employee’s SF 2809 was received by Tribal Employer
  - Date received is the date the HR office receives the form requesting the change or enrollment in coverage.

- The date that any enrollment, change in coverage, or cancellation takes effect
  - Effective date of action is the date that the change of coverage or enrollment becomes active.

- 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 this form
Figure 9: Part I To be completed by Tribal Employer

TIPS pre populates:

- Payroll Office Number (PON)
- Service Provider Contact
- Service Provider Telephone

<table>
<thead>
<tr>
<th>Part I – To be completed by Tribal Employer</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>REMARKS</strong></td>
</tr>
<tr>
<td>1. Date received (MM/DD/YYYY)</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>5. Authorizing official</td>
</tr>
<tr>
<td>7. Service Provider Contact</td>
</tr>
<tr>
<td>National Finance Center</td>
</tr>
<tr>
<td>12400096</td>
</tr>
</tbody>
</table>

Figure 10: SF 2809 Service Provider Information

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.
Sample Relationship Codes

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

<table>
<thead>
<tr>
<th>Relationship Status Code</th>
<th>TIPS Relationship Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>Spouse</td>
</tr>
<tr>
<td>09</td>
<td>Adopted Child</td>
</tr>
<tr>
<td>10</td>
<td>Foster Child</td>
</tr>
<tr>
<td>17</td>
<td>Stepchild</td>
</tr>
<tr>
<td>19</td>
<td>Child under age 26</td>
</tr>
<tr>
<td>99</td>
<td>Disabled Child age 26 or older who is incapable of self-support because of physical or mental disability that began before his/her 26th birthday</td>
</tr>
</tbody>
</table>
**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 to fill out the blank printout of a SF 2809 in TIPS.

*Figure 12: SF 2809 & SF 2810*
Exercise 2.2 Identifying the Appropriate QLE Code

In order to review SF 2809s Tribal Employers must be familiar with the Qualifying Life Event (QLE) Codes and under what circumstances each is applicable.

Exercise 2.2 will cover a series of three scenarios. Use the QLE table below to determine, which code is applicable for each scenario. In the space provided, identify for each scenario:

- Event Code
- Event Date

<table>
<thead>
<tr>
<th>Premium Conversion</th>
<th>Non-Premium Conversion</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1A</td>
<td>5A</td>
<td>Initial Opportunity to Enroll</td>
</tr>
<tr>
<td>1B</td>
<td>5B</td>
<td>Open Season</td>
</tr>
<tr>
<td>1C</td>
<td>5C</td>
<td>Change in family status that increases or decreases number of eligible family members</td>
</tr>
<tr>
<td>1D</td>
<td>5D</td>
<td>Reemployment after a break in service of more than three days</td>
</tr>
</tbody>
</table>

Scenario 1:

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 non-pay status and her FEHB coverage is terminated. Sally resumes working for the Tribal Employer on August 8, 2012 and submits a SF 2809 to receive coverage with an effective date of September 1, 2012. Sally participates in premium conversion.

Fill in the appropriate Event Code and Date of Event for Sally’s SF 2809:
Scenario 2:
Mark, a new Tribal Employee hired on April 3, 2012, opts to enroll in the FEHB program. Mark completes a SF 2809 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.

Fill in the appropriate Event Code and Date of Event for Mark's SF 2809:

Scenario 3:
Zachary, a Tribal Employee, is enrolled in FEHB and has a Self Only plan from his Tribal Employer. Zachary marries a non-Tribal Employee, Danielle, on July 12, 2012. Zachary wishes to change to a Self & Family plan so he can add Danielle to his FEHB coverage. Zachary submits a SF 2809 on July 19, 2012 to his Tribal Employer with this change with an effective date of August 1, 2012. Zachary participates in premium conversion.

Fill in the appropriate Event Code and Date of Event for Zachary's SF 2809:
SF 2810 Overview

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

<table>
<thead>
<tr>
<th>SF 2810 Paper Copy</th>
<th>SF 2810 in TIPS</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Identifying Information</td>
<td>A. Identifying Information</td>
</tr>
<tr>
<td>B. Termination</td>
<td>B. Termination</td>
</tr>
<tr>
<td>C. Transfer In</td>
<td>C. Reinstatement</td>
</tr>
<tr>
<td>D. Reinstatement</td>
<td>D. Change In Name of Enrollee</td>
</tr>
<tr>
<td>E. Change In Name of Enrollee</td>
<td>E. Remarks</td>
</tr>
<tr>
<td>F. Change in Enrollment-Survivor Annuitant</td>
<td>F. Date of Notice</td>
</tr>
<tr>
<td>G. Remarks</td>
<td></td>
</tr>
<tr>
<td>H. Date of Notice</td>
<td></td>
</tr>
</tbody>
</table>
SF 2810 in TIPS

**Figure 13: SF 2810 in TIPS**

**Tribal HR SF 2810 Information**

When completing a SF 2810, TIPS will auto populate the employee's:

- Tribal Employer
- Billing Unit / POI

**Figure 14: Tribal HR SF 2810 Information**
Part A – Identifying Information

TIPS will auto populate:

- Full Name
- Mailing Address
- Date of Birth
- Payroll Office Number (PON)
- Social Security Number
- Enrollment Code Number

Enter the Tribal employee’s:

- Date this action becomes effective

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Middle Initial</th>
<th>Date of Birth</th>
<th>Social Security Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRAINING</td>
<td>JOHN</td>
<td></td>
<td>2/1/1969</td>
<td>111999999</td>
</tr>
<tr>
<td>Home Address</td>
<td>Payroll office number</td>
<td>Enrollment code number</td>
<td>12400000</td>
<td>691</td>
</tr>
<tr>
<td>495 TRAINING DRIVE</td>
<td>Address Line 2</td>
<td>Date this action becomes effective</td>
<td></td>
<td></td>
</tr>
<tr>
<td>City</td>
<td>State</td>
<td>Zip</td>
<td></td>
<td></td>
</tr>
<tr>
<td>NASHVILLE</td>
<td>TN</td>
<td>37235</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Figure 15: Date Action Becomes Effective**

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)
  - The separated employee can stay on TCC for up to 18 months and their qualified dependents up to 36 months. The SF 2809 would need to be processed in a separate system called DPRW. Information on DPRW can be found on NFC’s site under Training Resources: DPRW Participant Guide.
Terminations can only be effective retroactively or in the current month.

**Part B – Termination**

In order to reinstate a Tribal employee, check the box in part D.

- The effective date that is entered in Part A should be the day after the termination/cancellation date. The only exception is if the effective date is the same as the original effective date. Ex. John Smith enrolled in TIPS effective 1/1/15, then terminated effective 1/1/15, then he can be reinstated effective 1/1/15.

- Possible reasons for reinstatement include:
  - Employee returns from military service
  - Erroneous error

**Part D – Reinstatement**

In order to reinstate a Tribal employee, check the box in part D.

**Part E – Change in Name of Enrollee**

In order to change the name and/or address of the enrollee check the Box in Part E.

- Enter the Tribal employee’s full new name and address.
Part G – Remarks
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.

Figure 19: Part G Remarks

Part H – Date of Notice
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

Figure 20: 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 to fill out the blank printout of the SF 2810 in TIPS.

Figure 21: Paper SF 2810 vs. SF 2810 in TIPS
### Transaction Glossary

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

#### The Role of TIPS in FEHB Transactions

**SF2809**
- Tribal Employer completes a SF 2809 in TIPS.
- TIPS Processes SF 2809s and sends to FEHB Plan Carriers.
- Transactions
  - Initial Enrollment
  - Enrollment Change
  - Cancellation
  - Corrective Actions

**SF 2810**
- Tribal Employer completes a SF 2810 in TIPS.
- TIPS Processes SF 2810s and sends to FEHB Plan Carriers.
- Transactions
- Change of Name
- Change of Address
- Termination
- Reinstatement

**OPM**

- OPM cancels/terminates coverage for a Tribal Employer Billing Unit/POI.
- TIPS prepares SF 2809s for and send to FEHB Plan Carriers.
- TIPS stores SF 2810s.
- Transactions
  - Tribal Employer Billing Unit/POI Cancellation
  - Tribal Employer Billing Unit/POI 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 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 Tribal Employers may never receive any communication from the NFC CLER team).
Enrollment Reconciliation Process Continued

1. NFC and Carriers submit enrollment information to CLER.
2. CLER compares enrollment information and identifies discrepancies on a quarterly basis.
3. NFC works with Tribal Benefits Officer to resolve discrepancies.
4. TIPS must be updated to reflect changes.
5. NFC contacts Carriers to resolve discrepancies.
Lesson 2: Knowledge Check

1. What are the four main TIPS functions?

2. Tribal Employers complete what two forms in TIPS to perform FEHB transactions?

3. True or False: The premium Conversion box must be checked for an enrollment with a series 1 even code?

4. OPM uses TIPS to perform what two FEHB transactions?
Lesson 2 Summary: TIPS and Enrollments
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.
Lesson 3 Objectives: Billing and TIPS Reports
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 available TIPS Reports.
- Identify the fields on a TIPS Report.

Billing Overview
Each Tribal Employer must establish one or more Billing Units / POIs to help organize Tribal Employee enrollments for different Tribal entities or businesses.

Tribal Employers must provide a bank account and routing number for each Billing Unit / POI.

A Preview Billing Report can be generated in TIPS at any point during the month. This is a snapshot of the Final Billing Report.

- Please note that the Preview Billing Report is updated with enrollee actions twice a day at 12pm CST and 3am CST. Any actions on an enrollee’s account that occur before those times will be reflected once the Preview Billing Report is updated.

A Final Billing Report can be generated in TIPS on the 1st calendar day of the following 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 Employer-level.
Billing Report
TIPS users can view their 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
- Enrollee Bill Amount
- Total Premium Amount
- Total Administrative Fee
- Total Adjustments
- Total Bill Amount

The screenshot below is a sample Billing Report in TIPS:

![Sample Billing Report]

*Figure 222: Sample Billing Report*

Calculating a Billing Report
Billing Reports are composed of two components:

- Plan premium
  - Refers to the monthly cost of the plan including both the Tribal Employer and Tribal Employee share

- Administrative fee
  - Refers to the fee covering NFC’s costs to administer TIPS

The formula to calculate each Billing Report is:
TIPS adds up the premiums and administrative fees for Tribal employees in a 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:

\[
(\text{Plan premium}) + (\text{Administrative fee}) = \text{Amount Due}
\]

\[
($335.57) + ($12.00) = $347.57
\]

**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:

\[
(\text{Plan premium}) \times (\text{Days covered} / \text{Days in month}) + (\text{Administrative fee}) = \text{Amount Due}
\]

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

\[
($335.57) \times (25/31) + ($12.00) = $282.62
\]
Billing Process
The diagram below describes the process for preparing and paying TIPS Billing Reports:

Billing report closes on 11:59 PM Mountain Time on the last calendar day of the month.

Accounts must be fully funded on the first business day of the month.

PADS prepares to debit accounts over the first two business days of the month.

TBO is notified within 1 to 2 weeks by OPM if account does not have sufficient funds.

TIPS will update to reflect that accounts have been paid.

On the third business day of the month PADS deducts the amount on the final billing report.
Billing Calendar

**MAY**

<table>
<thead>
<tr>
<th>Sunday</th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
<th>Saturday</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>24</td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>21</td>
<td>22</td>
<td>23</td>
<td>24</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>25</td>
<td>26</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>27 Memorial Day</td>
<td>28</td>
<td>29</td>
<td>30</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>31</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>PAD5 account information/ changes due</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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’s TIPS bank account information must be submitted at least three business days before a Tribal Employer Billing Unit/POI’s Billing Report closes.
- PADS prepares to debit the Tribal Employer Billing Unit/POI’s bank account provided in TIPS over the first two business days of the month.
- PADS debits the Tribal Employer Billing Unit/POI’s bank account on the third business day of the month.

**JUNE**

<table>
<thead>
<tr>
<th>Sunday</th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
<th>Saturday</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>27</td>
<td>28</td>
<td>29</td>
<td>30</td>
<td>31</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
</tr>
<tr>
<td></td>
<td></td>
<td>PAD5 debits bank account for bill amount</td>
<td></td>
<td></td>
<td>8</td>
<td>9</td>
</tr>
</tbody>
</table>

- PAD5 debits bank account for bill amount
FEHB Insufficient Funds Resolution Process

The diagram below describes the FEHB Insufficient Funds Resolution Process:

- If your account is billed and not enough funds are available, NFC will alert OPM.
- OPM will contact the Tribal Benefits Officer and alert them that their account contains insufficient funds.
- Tribal Benefits Officer must acknowledge that their account contains insufficient funds.
- Tribal Benefits Officer then deposits sufficient funds in the account and notifies OPM.
- OPM notifies NFC that the account has been funded.
- NFC runs PADS on the Tribal Employer Billing Unit/POI account to collect deposited funds.
Figure 23: Reports in TIPS

**Available Reports**
- There are 12 principle TIPS Reports.
- All are available from the left-hand side of the TIPS main page.
- TIPS Reports can be viewed in:
  - The TIPS Web Site (online)
  - Microsoft Excel
- All Tribal Employees’ SF 2809 and SF 2810 data is available.
- TIPS Reports will be available on-demand.

### Report Level of Detail

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Billing Unit/POI</th>
<th>Tribe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrollees by state, age, and plan</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>New enrollees</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Dis-enrollments</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Total number of enrollees</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Contact Information</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Open Season changes</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Reason for plan switch</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Effective coverage date</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Family Relationship</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Overall 2809/2810 report</td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>
Excel Format
TIPS Reports exported to Excel allow for easy customization by Tribal Employers.

The screenshot below is a sample TIPS Report:

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Controlled Unclassified Information</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Tribal Employer Number</td>
<td>Billing Unit/POI</td>
<td>Enrollee Name</td>
<td>Enrollee SSN</td>
<td>Enrollment Code</td>
<td>Premium Amount</td>
<td>Administrative Fee</td>
<td>Adjustments</td>
</tr>
<tr>
<td>3</td>
<td>6999 JOHN TRAINING</td>
<td>2119999999</td>
<td>892</td>
<td>407.38</td>
<td>0</td>
<td>0</td>
<td>407.38</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>6999 JOSHUA TRAINING</td>
<td>4053228</td>
<td>891</td>
<td>407.38</td>
<td>0</td>
<td>0</td>
<td>407.38</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>6999 SETH TRAINING</td>
<td>444545900</td>
<td>891</td>
<td>407.38</td>
<td>0</td>
<td>0</td>
<td>407.38</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Total: 5,122.14</td>
<td>Total: 50.00</td>
<td>Total: 50.00</td>
<td>Total Bill Amount:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Lesson 3: Knowledge Check

1. Billing Reports will be divided up by what identifier?

2. True or False: TIPS users can view their Billing Report at any time?

3. When does a Billing Report close?

4. Billing Reports are composed of what 2 components?

5. TIPS reports can be viewed in what two ways?
Lesson 3 Summary: Billing and TIPS Reports

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 available TIPS Reports.
- Identify the fields on a TIPS Report.
Lesson 4 Objectives: Special Transactions
By the end of this lesson, you should be able to:

- Add/remove a court ordered indicator to an employee's enrollment records.
- Process an information only 2809.
- Explain the Enrollee Billing Unit/POI Transfer process.
- List the TIPS transactions that may be processed retroactively.
- Utilize the Delete Function effectively.
- Explain the History/Archive Function.

Manage Court Orders
The Manage Court Orders function is 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.

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
- Being switched from a Self Plus One 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
- Be switched from a Self Plus One plan to a Self Only plan
Figure 24: Manage Court Orders

Information Only 2809
The Information Only SF 2809 will be used by Tribal Employers to:

- Edit enrollee information including name, social security number, address, date of birth, POI*, phone number and email address for corrective actions.
- Edit Other Insurance information.
- Add, edit, or remove a dependent. †

By selecting the Information Only option of the 2809, the corrections will be made but the status of the enrollment will not change.

* POI can only be corrected if the enrollment has never been billed. If billed, the POI field will be grayed out.

† When enrolling a dependent of an active enrollee, the user will receive an error message stating that the Social Security Number of the enrollee has been found on the dependent record of an active enrollee. To continue the enrollment, an Information Only 2809 must be processed on the active enrollee to remove the dependent, prior to the completion of the 2809 enrollment of the dependent.

Figure 25: Information Only Check Box
Both the enrollee information and family information fields will open for editing. Make any necessary edits, save, and submit.

**Enrollee Billing Unit/POI Transfer**

The Enrollee Billing Unit / POI Transfer process 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:

- A Billing Unit / POI Unit managed by your Tribal Employer
- A Billing Unit / POI Unit managed by another Tribal Employer participating in FEHB

The gaining Tribal Employer will need to obtain 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.

As conceptualized, the following considerations will need to 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.
• Tribal Employers in the current POI must use the CREATE SF 2809 for the enrollee on the INQUIRY screen under the current POI to begin transfer. On the SF 2809 they must enter a Cancel date effective the last day of the pay period that the employee is in that POI.
• The gaining Tribal Employer will enter a new SF 2809 for enrollment into the new POI with an effective date one day greater than the cancellation effective date in the former POI.
• The enrollee can only be entered in a new POI once the cancel/termination for former POI has been billed.

Retroactive Adjustments

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)
The following considerations will need to be acknowledged by a 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.
- Net credits will be applied to future bills until the adjustment’s balance is reduced to $0.
- Net debits will be applied in total to monthly bill in which the retroactive adjustment is entered into TIPS.

Delete Function

TIPS will allow Tribal Employers to use to Delete Function for non-processed and non-billed records.

Forms eligible for deletion:

- Health Benefits Election Form (SF 2809)
- Notice of Change in Health Benefits Enrollment (SF 2810)

The Delete button is located at the bottom of any form eligible for deletion.

![Delete button image]

Figure 28: Mark for Deletion

Once deleted, it CANNOT be restored; it can be viewed under the “Deleted 2809/2810” option.
Figure 29: Deleted 2809s/2810s

Once the form is deleted, the SSN will be released and a new form can be created under that SSN.

History/Archive
TIPS will allow you to “move to History” for enrollee’s prior forms to an archived status.

Enrollee can be moved to History if previously cancelled/terminated and there is a lapse in coverage with new enrollment in the same POI.

When the Create New Enrollment button is selected, the user will be prompted to indicate if the enrollee’s prior data should be moved to history. If selected, the data will no longer display under the Terminated Inquiry screen but will be viewed through the History Inquiry screen.

The New Enrollment form displayed from the Create New Enrollment will pre-populate with the enrollee’s data.

Notes:

- The Create New Enrollment button can only be used after the enrollee has been billed for the cancellation/termination action.
- You cannot use the Create New Enrollment button to move from POI to POI or tribe to tribe. This must be done by selecting Forms then Create 2809 from the Homepage.
Lesson 4: Knowledge Check
1. What information must you have in order to transfer an enrollee to a Billing Unit/POI managed by your Tribal Employer?

2. What do Court ordered indicators prevent?

3. True or False: Retroactive adjustments resulting in a net credit will result in a refund to your Tribal Employer’s bank account.
Lesson 4 Summary: Special Transactions

Now that you have completed this lesson, you should be able to:

- Add/remove a court ordered indicator to an employee’s enrollment records.
- Process an information only 2809.
- Explain the Enrollee Billing Unit/POI Transfer process.
- List the TIPS transactions that may be processed retroactively.
- Utilize the Delete Function effectively.
- Explain the History/Archive Function.
Lesson 5 Objective: Performing Transactions in TIPS

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

- Access TIPS.
- Navigate TIPS.
- Perform enrollment transactions using individual forms and the electronic upload process.
- 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.
- The 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.

![USDA Disclaimer]

*Figure 30: USDA Disclaimer*
How to Log in to TIPS
Follow these steps to log in to TIPS:

- Enter your username provided to you via email.
- Enter your password.
  - If you are logging in for the first time, your password will have been provided to you by your TSO.

Navigating TIPS: Main Page
TIPS is broken up into five main areas:

- Home
- Inquiry
- Forms
- Information
• Reports

**Figure 32: TIPS Main Page**

**Navigating TIPS: Inquiry**

The inquiry screen:

- Allows you to search for an employee enrolled in TIPS by name and/or Social Security Number / Unique Identifier.
- Allows you to see submitted SF 2809s and SF 2810s.
- Allows you to edit SF 2809s and SF 2810s that have been saved but not submitted.
- Allows you to create new SF2809s.
- Allows you to create SF 2810s.
- Allows you to Manage Court Orders.

**Figure 33: TIPS Enrollee Search**

**Navigating TIPS: Forms**

The Forms menu allows users to:

- Create a SF 2809.
- Perform an Electronic Upload.
  - Includes upload of SF 2809s

![Electronic Upload](image)

**Figure 34: Electronic Upload**

**Navigating TIPS: Information**

Using the information menu users can view:

- Contact info
  - OPM Helpdesk
  - NFC Helpdesk

- My info
  - Name
  - Role
  - Tribal Employer
  - Billing Units / POI

![Information Tab](image)

**Figure 35: Information Tab**
Navigating TIPS: Reports
Using the Reports menu located on the left-side of the main page, users can run a TIPS Report of their choice for a selected Tribal Employer Billing Unit / POI and time period.

![Figure 36: Reports Tab](image1)

Navigating TIPS: User Information
User account name and your level of system access are displayed in the upper right hand corner of all TIPS pages.

![Figure 37: Account Name and System Access](image2)

Please remember to always logout after you have finished using TIPS!
Types of Transactions in TIPS
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
- Corrective Actions
- Enrollment reinstatement
- Billing Unit/POI Transfer process
- Info only 2809
- Court ordered indicator
- Retroactive adjustments

Individual Forms vs. Electronic Upload
Individual Forms

- Enter all enrollee information into TIPS, one record at a time.
- Simpler when performing a few transactions.
- Easier to identify and correct errors.
- Cons
  - Time consuming when performing more than a few transactions.
  - Increases the risk of manual error in TIPS.

Electronic Upload

- Upload multiple records at the same time.
- Saves time when performing multiple transactions.
- Decreases the risk of manual error in TIPS.
- Cons
  - Errors in Electronic Upload files must be resolved individually.
  - Must adhere to a strict Electronic Upload format.

Selecting a Billing Unit/POI
Before you enter data in a SF 2809 or SF 2810 remember to:

- Confirm that the correct Tribal Organization is selected.
- Select the appropriate Tribal Organization Billing Unit / POI for the Tribal Employee.

Figure 38: Tribal Organization and Billing Unit/POI

Entering Enrollment Data via Individual Forms
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 you may select one of four options:

- **Cancel** – Deletes the draft form and returns you to the main page.
Holding a SF 2809 or SF 2810
After you select Submit, your form will be submitted to the appropriate FEHB Plan Carrier.

If you notice an error or need to stop a form after you have submitted, you may hold the form, 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 so that it can be processed and sent to the FEHB Plan Carrier.

Form Status
The status of SF 2809s and SF 2810s is located in the top right corner of the form.

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

- **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 for Edits** – Form has been taken out of the queue for Billing Report processing.
- **Processed** – Form has been sent to FEHB Plan Carriers and processed for billing and cannot be held or saved.

### Resolving Errors

If you attempt to submit individual SF 2809 or SF 2810s 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.

The screenshot below is a SF 2809 in TIPS with errors:

#### Health Benefits Election Form (2809)

**Tribal HR SF2809 Information**

- **Submit ID**
- **POI**
- **Submit Date**
- **SF2809 Status**

<table>
<thead>
<tr>
<th>Field</th>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preferred Telephone Number (xxx)xxx-xxxx</td>
<td>Text</td>
<td>Value must not be blank</td>
</tr>
<tr>
<td>Social Security Number</td>
<td>Text</td>
<td>Value must not be blank</td>
</tr>
<tr>
<td>Date of Birth (MM/DD/YYYY)</td>
<td>Text</td>
<td>Value must not be blank</td>
</tr>
<tr>
<td><strong>Sex</strong></td>
<td>Picklist</td>
<td>Male</td>
</tr>
<tr>
<td><strong>Are you married?</strong></td>
<td>Picklist</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Home mailing address</strong></td>
<td>Text</td>
<td>Value must not be blank</td>
</tr>
<tr>
<td><strong>Address Line 2</strong></td>
<td>Text</td>
<td>Value must not be blank</td>
</tr>
<tr>
<td><strong>City</strong></td>
<td>Text</td>
<td>Value must not be blank</td>
</tr>
<tr>
<td><strong>State</strong></td>
<td>Picklist</td>
<td>Value</td>
</tr>
<tr>
<td><strong>Zip</strong></td>
<td>Text</td>
<td>Value must not be blank</td>
</tr>
<tr>
<td><strong>Medicare (if you are covered/Medicare Claim Number</strong></td>
<td>Text</td>
<td>Value must not be blank</td>
</tr>
<tr>
<td><strong>Are you covered by insurance other than Medicare?</strong></td>
<td>Picklist</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Indicate other types of insurance</strong></td>
<td>Picklist</td>
<td>TriCare</td>
</tr>
<tr>
<td><strong>Name of insurance</strong></td>
<td>Text</td>
<td>Value must not be blank</td>
</tr>
<tr>
<td><strong>Policy no.</strong></td>
<td>Text</td>
<td>Value must not be blank</td>
</tr>
</tbody>
</table>

*Figure 41: SF 2809 with Errors*

### Resolving Electronic Upload Errors

If TIPS identifies an error(s) after submission of an Electronic Upload, you will receive an email notifying you of the records with the error(s) and what caused the error(s). All pending errors must be resolved in a new Electronic Upload file that needs to be renamed and resubmitted in TIPS.

**Double-check your 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

Billing Reports can be prepared from the TIPS main page. Depending on the user’s role, access 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.

Walkthroughs and Exercises
We will now walkthrough and practice 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
Exercise 5.1: Individual Enrollment
Create a new enrollment in TIPS using the below information.

Instead of submitting the enrollment form when finished, select Save.

Individual Enrollment

In order to perform an individual enrollment, follow these steps:

1. Open the TIPS web portal and login with Username and Password.

2. Select Create 2809 under the Forms tab.

3. Select Tribal Organization and select Billing Unit/POI from the drop down menus.

4. Complete:
   a. Part A: Enrollee Information (Refer to the handout with your login information for the Social Security Number to use in this exercise)
b. Part C: FEHB Plan You Are Enrolling In or Changing To

<table>
<thead>
<tr>
<th>Part B - FEHB Plan You Are Currently Enrolled In (If Applicable)</th>
<th>Part C - FEHB Plan You Are Enrolling In or Changing To</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Plan name</td>
<td>1. Plan name</td>
</tr>
<tr>
<td>2. Enrollment code</td>
<td>2. Enrollment code</td>
</tr>
<tr>
<td>TRIPLE S, SALUD</td>
<td>091</td>
</tr>
</tbody>
</table>

c. Part D: Event That Permits You to Enroll, Change, or Cancel

<table>
<thead>
<tr>
<th>Part D - Event That Permits You To Enroll, Change, or Cancel</th>
<th>Part E - Cancellation of FEHB</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Event code</td>
<td>Premium Conversion</td>
</tr>
<tr>
<td>IA</td>
<td>I CANCEL my enrollment.</td>
</tr>
<tr>
<td>09/01/2017</td>
<td></td>
</tr>
</tbody>
</table>

5. Once you have completed the form click **Save** -- NOT -- **Submit**.
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 adding in the spouse’s information.

Submit the SF 2809.

**Updating a Saved Enrollment**

1. Select **Enrollee** under the **Inquiry** tab.

2. Enter one or more of the following, and then click **Search**:
   a. Social Security Number
   b. First, middle, and last name
   c. Select the appropriate Tribe and Billing Unit/POI

3. Select View **SF 2809**.

4. Change from Not Married to Married.

5. Change the Enrollment Code to reflect **Self and Family** instead of **Self.** Change the **891** to **892**.
6. Check the box that says **Add/Edit Family Member Information**. Fill in the spouse’s information. Use the Social Security Number from your User Login information sheet. Then click on the **Add Member** button.

7. The spouse’s information should populate at the bottom of the page. Select **Submit**.
Exercise 5.3: Holding, Updating, and Submitting an Enrollment

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.

**Holding, Updating, and Submitting an Enrollment**

1. Select **Enrollee** under the **Inquiry** tab

2. Enter one or more of the following, and click **Search**:
   a. Social Security Number
   b. First, middle, and last name
   c. Select the appropriate Tribe and Billing Unit/POI

3. Select **View SF 2809**.

**Exercise 5.3: Holding, Updating, and Submitting an Enrollment**

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.

**Holding, Updating, and Submitting an Enrollment**

1. Select **Enrollee** under the **Inquiry** tab

2. Enter one or more of the following, and click **Search**:
   a. Social Security Number
   b. First, middle, and last name
   c. Select the appropriate Tribe and Billing Unit/POI

3. Select **View SF 2809**.
4. Select the **Hold** button at the bottom of the form.

5. Change the birthday for the employee to reflect **03/01/1970**.

6. Click **Submit**.
Exercise 5.4: Enrollment Termination
Terminate your assigned enrollee in TIPS using the information found on your User Login Information sheet.

Enrollment Termination

1. Select **Enrollee** under the **Inquiry** tab.

   ![Inquiry Tab](image)

   - Select **Enrollee under the Inquiry tab**.
   
   - Enter one or more of the following, and click **Search**:  
     a. Social Security Number
     b. First, middle, and last name
     c. Select the Appropriate Tribe and Billing Unit/POI

   ![Enrollee Search Form](image)

2. Click on **Create 2810**.

   ![Create 2810](image)

3. Complete:
   a. Part A: Date this action becomes effective
   b. Part B: Mark the Termination check box. Please note that if this is due to death, you would also need to fill in the Date of Death box.
5. Complete Part H with all required fields including the Date of Notice.

6. Click **Submit** in order to finalize the form and submit it for processing.
Exercise 5.5: Preparing a Billing Report

Run a Billing Report in TIPS on your Billing Unit/POI. Make sure you are using Training Tribe and POI 6XXX.

Do not export the report, view it in your TIPS portal.

Preparing a Billing Report

1. From the Home page select Billing Report from the menu on the left-hand side.

2. Select your report criteria, and then click Generate Report:
   a. Billing Period
   b. Billing Unit/POI

Exercise 5.6: Overall SF 2809/SF 2810 Report
Generate an Over SF 2809/ SF 2810 TIPS Report from your Tribal Employer Billing Unit/POI. Make sure you are using Training Tribe and POI 6XXX.

Do not Export the report to Excel, view it in the TIPS portal.

Overall SF 2809/SF 2810 Report
1. From the Home page, select Overall 2809/2810 Report from the menu on the left-hand side.
2. Select your report criteria and then click on Generate Report:
   a. Tribal Organization
   b. Billing Unit/POI
   c. Month and Year
3. View report in the TIPS portal; do not Export to Excel.
Lesson 5 Summary: Performing Transactions in TIPS

Now that you have completed this lesson, you should be able to:

- Access TIPS.
- Navigate TIPS.
- Perform enrollment transactions using individual forms and the electronic upload process.
- Prepare TIPS Reports.
- Review your billing report in TIPS.
Lesson 6 Objectives: Obtaining Additional Assistance

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

- Describe the standard Tribal Employer inquiries.
- Demonstrate an understanding of types of inquiries handled by NFC and other external organizations.
- Demonstrate how to navigate the TIPS website.
- Submit an inquiry using the ServiceNow Customer Service Portal.

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?

Different stakeholders are involved with resolving these inquiries. We’ll explore further in this section how to best resolve different types of inquiries.

Inquiries Handled by NFC Contact Center and Other Organizations

Contact Center

Types of Inquiries:

- General program inquiries
- Inquiries regarding completing a form
- Assistance with Electronic Upload errors
- Assistance with generating a TIPS Report
- Billing and technical inquiries
- Billing discrepancies
- System issues and outages
- Assistance with navigating the TIPS website

Other Organizations

<table>
<thead>
<tr>
<th>OPM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Policy Inquiries</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tribal Employers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee-specific inquiries</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>FEHB Plan Carriers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call Centers</td>
</tr>
<tr>
<td>Coverage Inquiries</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tribal Security Officer</th>
</tr>
</thead>
<tbody>
<tr>
<td>TIPS Username Setup and Security Inquiries</td>
</tr>
</tbody>
</table>

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

OPM Tribal Desk can be reached at: 202-606-2530
# TIPS Inquiry Guide

The guide below outlines the points of contact that will be responsible for resolving the different TIPS inquiries that may arise for Tribal Employers.

<table>
<thead>
<tr>
<th>Inquiry Type</th>
<th>Example Inquiries</th>
<th>Who To Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Implementation Inquiries</strong></td>
<td>• Confirming receipt of Authorized Contact Designation Forms or other parts of the OPM Agreement Package</td>
<td>NFC TIPS Operations <a href="mailto:Tipsoperations@nfc.usda.gov">Tipsoperations@nfc.usda.gov</a></td>
</tr>
<tr>
<td><strong>Processing, Technical and Billing Inquiries</strong></td>
<td>• 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</td>
<td>TIPS Contact Center 1-855-NFC-4GOV (632-4468) <a href="http://tips.nfc.usda.gov">http://tips.nfc.usda.gov</a></td>
</tr>
<tr>
<td><strong>TIPS Access Inquiries</strong></td>
<td>• Establishing or modifying TIPS TSOs and User IDs • Assigning User ID roles</td>
<td>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 <a href="mailto:nfc.securityofc@nfc.usda.gov">nfc.securityofc@nfc.usda.gov</a></td>
</tr>
<tr>
<td><strong>Program and Policy Inquiries</strong></td>
<td>• Determining if eligible to participate in FEHB • Requesting an FEHB Agreement Package or program training</td>
<td>U.S. Office Personnel Management 1-202-606-2530 or <a href="mailto:TribalPrograms@opm.gov">TribalPrograms@opm.gov</a></td>
</tr>
<tr>
<td><strong>Carrier Specific Inquiries</strong></td>
<td>• To change an enrolled employee’s address or add a family member under an already existing family enrollment</td>
<td>Contact the specific FEHB Plan for information.</td>
</tr>
</tbody>
</table>
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, and write down your answer in your participant guide.

1. I logged into TIPS, but I’m confused on how to navigate the system. Specifically I cannot figure out how to use the electronic upload process.

2. Hi, I am the Tribal Security Officer for my Tribal Employer. The passwords provided are not working. Who can help me reset the passwords?

3. Can I continue providing coverage to one of my employees even after they leave Tribal employment?

4. My employee has not received their insurance card. Do you know when they can expect to receive their card?

5. When will the Final Billing Report post each month?

6. My Tribal employee needs coverage for an upcoming operation. Will their FEHB Plan Carrier cover this procedure?

7. I’m unable to generate and download a TIPS Report, can you help me with this process?

8. I’m not sure if this is the right number or not but I got your number from a friend in another tribe. I’m interested in learning about the program and whether or not we would be eligible to offer Federal health benefits to our employees. Can you tell me more about the program?
9. I've been trying to log into the TIPS system all morning and it's not working. Are you able to log into the system and enter this SF 2809 for me?

10. One of my employees just adopted a child and submitted a QLE request. I'm not sure if they can switch their plan at this time. Who can help verify their eligibility under the FEHB program?
TIPS Website
Additional information can also be found on the TIPS website at https://tips.nfc.usda.gov.

Submitting Inquiries Online
TBOs and other Authorized Contacts may submit inquiries online using the ServiceNow Customer Service Portal.

- To add Authorized Contacts please call the TIPS Contact Center.

Links to ServiceNow are available:

- On the TIPS website
- Inside TIPS on the Help page under the Information tab

In order to access ServiceNow you will receive a username and password from NFC.

Your TIPS login is independent from your ServiceNow login
About the ServiceNow Customer Service Portal

ServiceNow allows Tribal Employers to:

- Report Issues.
- Request Items/Services.
- Check the status of incidents or requests.
- View past incidents or requests.

Creating a Request in ServiceNow

In order to create a Request in ServiceNow, follow these steps:

1. Open the ServiceNow Customer Service Portal and login with your Username and Password.
2. Read the warning and Select OK to enter ServiceNow.

nfcerp.service-now.com says:

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.

I certify that I am authorized to access this system.
I take full responsibility for any actions I take while using this system.

OK  Cancel
3. Select **Report Issue**.

4. Fill out the required fields and Select **Submit**.
Lesson 6: Knowledge Check

1. Who can resolve inquiries regarding coverage plans?

2. Who can resolve billing and technical inquiries?

3. Who can assist with inquiries regarding navigation of the TIPS system?

4. Who can resolve questions regarding policy inquiries?

5. Who can resolve inquiries regarding TIPS Username Setup and Security Inquiries?
Lesson 6 Summary: Obtaining Additional Assistance

Now that you have completed this lesson, you should be able to:

- Describe the standard Tribal Employer inquiries.
- Demonstrate an understanding of types of inquiries handled by NFC and other external organizations.
- Demonstrate how to navigate the TIPS website.
- Submit an inquiry using the ServiceNow Customer Service Portal.
TIPS Transactions References

The preceding pages provide steps for completing a number of core TIPS activities. References can be found for the following activities:

- Creating new SF 2809s in TIPS
- Creating SF 2810s in TIPS
- Information Only SF 2809
- Managing Contacts in TIPS
- Billing Functionality
- Electronic Upload Process
Creating New 2809s in TIPS

Tribal Employers may create a “New 2809” due to one of the following circumstances:

1. Active FEHB enrollee experiences a Qualifying Life Event (QLE) and wishes to change their coverage
2. Active FEHB enrollee wishes to cancel his/her FEHB enrollment

Steps
1. Login to the TIPS web portal with Username and Password.
2. Select the Enrollee button located under the Inquiry tab.
3. Enter the enrollee's information in all listed fields and click Search.
4. Locate the enrollee and click the Create 2809 button.
5. When filling out a 2809 for a change of coverage or cancellation, please take the following into consideration:
   a. Enrollee and family member information will be pre-populated into the new 2809 and only the fields not greyed out will be editable.
   b. Informational changes such as changes in marital status, Medicare status, and other insurance statuses can only be made in conjunction with a change in FEHB coverage via a Qualifying Life Event (QLE).
c. Please ensure that all information on the 2809 is up to date prior to submitting (Reminder: Name changes must be made using a 2810).
Creating 2810s in TIPS

Tribal Employers may create a 2810 to complete one of the following actions:

1. Terminate an employee’s coverage.
2. Reinstate an employee’s enrollment previously terminated.
3. Change the name or address stated on an employee’s enrollment.

Steps

1. Login to the TIPS web portal with Username and Password.
2. Select the Enrollee button located under the Inquiry tab.
3. Enter the enrollee’s information in all listed fields and click Search.
4. Locate enrollee and click the Create 2810 button.
5. When filling out a 2810 for termination, reinstatement, or change of name and/or address, please take the following into consideration:
   a. Enrollee information will be pre-populated into the 2810 and only the fields not greyed out will be editable.
   b. Only one change can be completed per 2810 (No combinations of Part B, Part D, and Part E can be on the same 2810).
   c. Please ensure that all information on the 2810 is up to date prior to submitting.
## Notice of Change in Health Benefits Enrollment (2010)

**Part A - Beneficiary Information**

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Middle Initial</th>
<th>Date of Birth</th>
<th>Social Security Number</th>
<th>Enrollment Start Date</th>
<th>Enrollment End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>TAYLOR</td>
<td>DEE</td>
<td></td>
<td>02/21/1964</td>
<td>1445056689</td>
<td>01/01/2021</td>
<td>12/31/2021</td>
</tr>
</tbody>
</table>

**Part B - Terminations**

- Your enrollment has been terminated effective on the date in Part A, Item 1 above. Your coverage is extended for 30 days after that date.

**Part C - Notices**

- The termination date is the date on which the enrollee is mailed a notice of the termination of coverage.

**Part D - Requests**

- Name of Tribal Employer: [Insert Name]
- Contact Person: [Insert Name]
- Contact Phone: [Insert Phone]

---

*USDA NFC | Tribal Employer Participant Guide - Internal Document Copyright © 2012*
Information Only 2809
The Information Only 2809 function will be used by Tribal Employers to add, edit, remove a dependent, or make corrective actions by selecting the Information Only option on the 2809. The status of the enrollment will not change. When enrolling a dependent of an active enrollee, the user will receive an error message stating that the Social Security Number of the enrollee has been found on the dependent record of an active enrollee. To continue the enrollment, an Information Only 2809 must be processed on the active enrollee to remove the dependent, prior to the completion of the 2809 of the dependent. You would also use this form to make corrective actions such as editing the enrollee’s name, SSN, address, DOB, POI, phone number, and/or email address.

Steps
1. Login to the TIPS web portal with Username and Password.
2. Select the Enrollee option under the Inquiry tab.
3. Input the enrollee’s information in all of the listed fields and click Search.
4. In the Inquiry results displayed, click the Create 2809 button for the enrollee.
5. Check the Information Only checkbox.
6. Click the **Add Member, Edit** or **Delete** button to edit or delete the Dependent information from the Family member section. Make the desired changes.

7. Select the **Submit** button.
Managing Contacts in TIPS
The Tribal Employer Maintenance Contact is responsible for updating contact information for all authorized contacts in TIPS. Each Tribal Employer will have two maintenance contacts. Please see the steps below for adding and editing contact information.

Steps
1. Login to the TIPS web portal with Username and Password.
2. Select the Manage Contacts Button.
3. If you are adding a new contact, input contact’s information in all listed fields and click Add Contact.
4. If you need to edit details on existing contact, select Tribe and POI. Then click on View Contact.
5. Click beside contact’s name on the **Edit Details** button to make any necessary changes.
**Billing Functionality**

Tribal Employers may create a billing report for an individual Personnel Office Identifier (POI)/Billing Unit. Two billing report types can be generated: “PREVIEW” and “FINAL.” The report type can be found in the upper left hand corner of the generated billing report. A preview billing report will reflect the amount due for the specified date. The final billing report can only be generated on the 1st calendar day of the following month and reflects the amount of money that will be debited from a POI bank account. The below action steps demonstrate how to access the billing report selection in TIPS.

**Steps**

1. Login to the TIPS web portal with Username and Password.
2. Select the **Billing Report** button located under the Report Section.
3. Select the POI and Billing Period.
4. Click **Generate** to create Billing Report with specific information.
Electronic Upload Process

Steps

1. Login to the TIPS web portal with Username and Password.
2. Select **Electronic Upload** from the **Forms** tab.
3. Enter Email Address, Records Sent, Tribe, and Billing Unit/POI. Then click on **Browse** to find the .TXT file containing any SF 2809 information that you wish to upload.

Overview of Fields:

a. **Email Address**: Enter the email address of the individual who is responsible for resolving any errors, which may be found after the .TXT file is submitted.

b. **Records Sent**: Note the total number of SF 2809s that were included in the electronic upload file.

c. **Billing Unit/POI**: Indicate the Billing Unit/POI associated with the electronic upload file.
.TXT File Information

- In the upload template there are a series of rows that each correspond to a field on the SF2809 enrollment form in TIPS. The number “1” of each row in the template contains the data fields for the enrollee. You will notice at the beginning of each row which begins with the number “1”, indicates the start of a new 2809. When submitting an upload file with multiple 2809s, each 2809 must be separated by number “1”.

- The second grouping of rows is for any of the enrollee’s family members who want to enroll. You will notice at the beginning of each row the number “2” which indicates the start of a new family member being added to the enrollee’s 2809. When adding family members to a 2809, each family member must be separated by number “2”.

Example:

```
<table>
<thead>
<tr>
<th>1</th>
<th>ENROLLEE_FIRST_NM</th>
<th>ENROLLEE_MIDDLE_NM</th>
<th>ENROLLEE_LAST_NM</th>
<th>DAY_PHONE_NBR</th>
<th>SSN0</th>
<th>BIRTH_DT</th>
<th>SEX_CD</th>
<th>MARITAL_STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>MEMBER_FIRST_NM</td>
<td>MEMBER_MIDDLE_NM</td>
<td>MEMBER_LAST_NM</td>
<td>SSN0</td>
<td>BIRTH_DT</td>
<td>SEX_CD</td>
<td>HOME_ADDRESS_LINE1</td>
<td>HOME_ADDRESS_LINE2</td>
</tr>
</tbody>
</table>
```

Complete the .TXT file with these guidelines

- The rows in the upload template correspond to the fields in the 2809 form in TIPS. For example, the row that begins with the number “1” must contain all the enrollee’s required information indicated on Table 1. You will notice the horizontal pipe character (|) within each row. Throughout the upload template the information to the right of the horizontal pipe character (|) indicates what data should be entered in that row. Do not remove any pipe characters (|) or the horizontal bar itself.

- If there is a row that is not required and you do not have any data to enter in that field then leave the space to the right of the horizontal pipe character (|) blank. Do not delete any pipe characters (|) in the 2809. However, when populating the upload template for an enrollee with no family members then you should delete all of the rows for a family member (including the number “2” at the beginning of each row). See the example upload file to see how completed rows should be populated.
The blank upload template contains the rows for one 2809 and one family member. To enter multiple 2809s simply copy the group of rows for an enrollee’s 2809 (including the number “1” which indicates the start of a new 2809) and paste it below the first group of 2809 rows and repeat until you have enough 2809 row groupings (separated by the number “1” which indicates the start of a new 2809 header) for the number of enrollees you want to enter. Perform the same process for adding multiple family members to a 2809 (separated by the number “2” which indicates the start of a new family member header.)

4. When you are ready to submit your file after completing the upload template, you must assign a unique filename to the upload file. The filename convention is as follows: TIPS99_9999_YYYY.MM.DD.TXT.

Naming Convention Explanation:
99 = Two-digit number that is user selectable representing the number of uploads for that day
9999 = Four-digit Billing Unit/POI of the enrollees populated in the upload file
YYYY = Year of submission
MM = Month of submission
DD = Day of submission

Example: A Tribal Employer submitting their third electronic upload file into TIPS in the same day on July 1, 2012 for enrollees in Billing Unit/POI 6500 would assign that upload file the following filename: TIPS03_6500_2012.07.01.TXT.

5. Click Submit.
After you have submitted your upload file in TIPS, you will notice an indication that the file was uploaded successfully. The system will then process your file. Once the system completes the processing of the information, you will receive a confirmation email indicating whether your upload file was successfully processed or if there were errors in your upload file that require your attention. Once the error(s) are corrected, the text file can be uploaded again to TIPS.
### TABLE 1 – Upload Template Row Descriptions

Each new 2809 record must start with the following header: `BulkUpload.TIPS_SF2809`

<table>
<thead>
<tr>
<th>Data Field Label</th>
<th>Required/Not Required</th>
<th>Description</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>(the term “value” in each label below indicates where you would input your data for that row in the template)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ENROLLEE_FIRST_NM</td>
<td>value</td>
<td>Required</td>
<td>Enrollee’s First Name</td>
</tr>
<tr>
<td>ENROLLEE_MIDDLE_NM</td>
<td>value</td>
<td>Not Required</td>
<td>Enrollee’s Middle Name</td>
</tr>
<tr>
<td>ENROLLEE_LAST_NM</td>
<td>value</td>
<td>Required</td>
<td>Enrollee’s Last Name</td>
</tr>
<tr>
<td>DAY_PHONE_NBR</td>
<td>value</td>
<td>Required</td>
<td>Enrollee’s daytime phone number</td>
</tr>
<tr>
<td>SSNO</td>
<td>value</td>
<td>Required</td>
<td>Enrollee’s Social Security Number</td>
</tr>
<tr>
<td>BIRTH_DT</td>
<td>value</td>
<td>Required</td>
<td>Enrollee’s Date of Birth</td>
</tr>
<tr>
<td>SEX_CD</td>
<td>value</td>
<td>Required</td>
<td>Enter M or F</td>
</tr>
<tr>
<td>Data Field Label</td>
<td>Required/Not Required</td>
<td>Description</td>
<td>Comments</td>
</tr>
<tr>
<td>--------------------------</td>
<td>-----------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>---------------------------</td>
</tr>
</tbody>
</table>
| MARITAL_STATUS|value | Required | Enter Y or N  
Y=Married  
N=Single/Divorced/  
Widowed |  |
<p>| HOME_ADDRESS_LINE1|value | Required | Enrollee’s address street and suite/apartment/etc. number. Standard address abbreviations are acceptable in all address fields in the upload template (e.g., “st” for street, “ave” for avenue, etc) | 35 character max |
| HOME_ADDRESS_LINE2|value | Not Required | Further address information | 35 character max |
| HOME_ADDRESS_CITY|value | Required | Enrollee’s home city | 23 character max |
| HOME_ADDRESS_STATE|value | Required | Enrollee’s home state | 2 character max |
| HOME_ADDRESS_ZIP5|value | Required | Enrollee’s 5-digit zip code | 5 character max |</p>
<table>
<thead>
<tr>
<th>Data Field Label</th>
<th>Required/Not Required</th>
<th>Description</th>
<th>Comments</th>
</tr>
</thead>
</table>
| MEDICARE_A_EMPL_IND | Required | Enter Y or N | Y=Employee currently has Medicare A  
N=Employee does not currently have Medicare A |
| MEDICARE_B_EMPL_IND | Required | Enter Y or N | Y=Employee currently has Medicare B  
N=Employee does not currently have Medicare B |
| MEDICARE_D_IND  | Required | Enter Y or N | Y=Employee currently has Medicare D  
N=Employee does not currently have Medicare D |
| MEDICARE_NBR   | Required if any Medicare indicator is “Y” | Alphanumeric field for the enrollee’s Medicare Number | Must be in format: “NNNNNNNNNXX”  
N=Numeric  
X=Alpha |
<table>
<thead>
<tr>
<th>Data Field Label</th>
<th>Required/Not Required</th>
<th>Description</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>OTHER_THAN_MEDICARE_IND=value</td>
<td>Required</td>
<td>Enter Y or N</td>
<td>For “Y”: TRICARE_IND, Other_INSURANCE_IND, or FEHB_TRANSACTION_CD must be Y. For “N”: TRICARE_IND, Other_INSURANCE_IND, and FEHB_TRANSACTION_CD must all be N.</td>
</tr>
<tr>
<td>TRICARE_IND=value</td>
<td>Required</td>
<td>Enter Y or N</td>
<td>Y=Employee currently has Tricare. N=Employee does not currently have Tricare.</td>
</tr>
<tr>
<td>FEHB_TRANSACTION_CD=value</td>
<td>Required</td>
<td>Enter Y or N</td>
<td>If Y, 2809 will be rejected.</td>
</tr>
<tr>
<td>Data Field Label</td>
<td>Required/Not Required</td>
<td>Description</td>
<td>Comments</td>
</tr>
<tr>
<td>--------------------------------------</td>
<td>-----------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-----------------------------------------------</td>
</tr>
<tr>
<td>OTHER_INSURANCE_IND</td>
<td>value</td>
<td>Required</td>
<td>Enter Y or N</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Y=Employee currently has other insurance</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>N=Employee does not currently have other insurance</td>
<td></td>
</tr>
<tr>
<td>OTHER_INSURANCE_NM</td>
<td>value</td>
<td>Required if OTHER_INSURANCE_IND is “Y”</td>
<td>The <strong>policy name</strong> for employee’s other insurance</td>
</tr>
<tr>
<td>OTHER_INSURANCE_POLICY_NBR</td>
<td>value</td>
<td>Required if OTHER_INSURANCE_IND is “Y”</td>
<td>The <strong>policy number</strong> for employee’s other insurance</td>
</tr>
<tr>
<td>PRESENT_ENROLLMENT_CD</td>
<td>value</td>
<td>Not Required</td>
<td>Enrollment Code of the enrollee’s current plan</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Only used for Qualifying Life Event that changes an Enrollment Code</td>
</tr>
<tr>
<td>NEW_ENROLLMENT_CD</td>
<td>value</td>
<td>Required for 1A and 5A Qualifying Life Events</td>
<td>Enrollee’s new Enrollment Code</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Verify the Qualifying Life Event permits change of Enrollment Code</td>
</tr>
<tr>
<td>EVENT_CHANGE_IND</td>
<td>value</td>
<td>Required</td>
<td>Qualifying Life Event Code for the 2809</td>
</tr>
<tr>
<td>EVENT_CHANGE_DT</td>
<td>value</td>
<td>Required</td>
<td>Date the Qualifying Life Event occurred</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Must be in format: “MM/DD/YYYY”</td>
</tr>
<tr>
<td>Data Field Label</td>
<td>Required/Not Required</td>
<td>Description</td>
<td>Comments</td>
</tr>
<tr>
<td>------------------</td>
<td>-----------------------</td>
<td>-------------</td>
<td>----------</td>
</tr>
</tbody>
</table>
| PREMIUM_CONVERSION_IND | Required | Enter Y or N  
Y=Enrollee wishes to have Premium Conversion  
N=Enrollee does not wish to have Premium Conversion | If Y, “EVENT_CHANGE_IND” must be a series 1 code (i.e., 1A, 1B, etc.)  
If N, “EVENT_CHANGE_IND” must be a series 5 code (i.e., 5A, 5B, etc.) |
| PARTF_CANCEL_IND | Not Required | Enter Y or N  
Y=2809 is for a cancellation  
N=2809 is not for a cancellation | |
<p>| REMARKS | Required | This field is required if the transaction submitted date is greater than 60 days from the QLE. This field is optional for transactions processed within the 60 day window. | 400 character max |</p>
<table>
<thead>
<tr>
<th>Data Field Label</th>
<th>Required/Not Required</th>
<th>Description</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>PERSONNEL_RECEIVED_DT</td>
<td>Required</td>
<td>The date the document was received by Tribal HR</td>
<td>Must be in format: “MM/DD/YYYY”</td>
</tr>
<tr>
<td>ELECTION_EFFECTIVE_DT</td>
<td>Required</td>
<td>Effective date of Enrollment</td>
<td>Must be in format: “MM/DD/YYYY”</td>
</tr>
<tr>
<td>AGENCY_PHONE_NBR</td>
<td>Required</td>
<td>The phone number of the Tribal Employer’s HR Office</td>
<td></td>
</tr>
<tr>
<td>HR_OFFICE_NM</td>
<td>Required</td>
<td>Name of Tribal Employer's HR Office</td>
<td>35 character max</td>
</tr>
<tr>
<td>HR_OFFICE_ADDRESS1</td>
<td>Required</td>
<td>Address of Tribal Employer's HR Office</td>
<td>35 character max</td>
</tr>
<tr>
<td>HR_OFFICE_ADDRESS2</td>
<td></td>
<td>Further Address Information</td>
<td>35 character max</td>
</tr>
<tr>
<td>HR_OFFICE_ADDRESS3</td>
<td></td>
<td></td>
<td>35 character max</td>
</tr>
<tr>
<td>HR_OFFICE_CITY</td>
<td>Required</td>
<td>City of Tribal Employer's HR Office</td>
<td>23 character max</td>
</tr>
<tr>
<td>HR_OFFICE_ST</td>
<td>Required</td>
<td>State of Tribal Employer's HR Office</td>
<td>2 character max</td>
</tr>
</tbody>
</table>
**Data Field Label**  
(the term “value” in each label below indicates where you would input your data for that row in the template)

<table>
<thead>
<tr>
<th>Data Field Label</th>
<th>Required/ Not Required</th>
<th>Description</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_OFFICE_ZIP_CD</td>
<td>value</td>
<td>Required</td>
<td>Zip code of Tribal Employer's HR Office</td>
</tr>
</tbody>
</table>
| HR_OFFICE_COUNTRY_CD| value | Required | Country of Tribal Employer's HR Office | 3 character max  
Example: USA |
| AUTHORIZING_OFFICIAL_FIRST_NM| value | Required | Full name of Authorizing Official for your Tribal Employer | 17 character max  
Example: John Doe |

*The following section corresponds to a family member.*  
Each new family member record must start with the following header:
BulkUpload.TIPS_SF2809_FAMILY

<table>
<thead>
<tr>
<th>Data Field Label</th>
<th>Required/ Not Required</th>
<th>Description</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>MEMBER_FIRST_NM</td>
<td>value</td>
<td>Required</td>
<td>Family Member’s First Name</td>
</tr>
<tr>
<td>MEMBER_MIDDLE_NM</td>
<td>value</td>
<td>Required</td>
<td>Family Member’s Middle Name</td>
</tr>
<tr>
<td>MEMBER_LAST_NM</td>
<td>value</td>
<td>Required</td>
<td>Family Member’s Last Name</td>
</tr>
<tr>
<td>Data Field Label</td>
<td>Required/Not Required</td>
<td>Description</td>
<td>Comments</td>
</tr>
<tr>
<td>--------------------</td>
<td>-----------------------</td>
<td>-------------------------------------------------------</td>
<td>--------------------------------------------------------------------------</td>
</tr>
<tr>
<td>SSNO\text{\textbar}value</td>
<td>Required</td>
<td>Family Member's Social Security Number</td>
<td>Example: 012345678 No dashes allowed Include any leading zeros as illustrated in the example above</td>
</tr>
<tr>
<td>BIRTH\text{\textunderscore}DT\text{\textbar}value</td>
<td>Required</td>
<td>Family Member's Date of Birth</td>
<td>Must be in format: &quot;MM/DD/YYYY&quot;</td>
</tr>
</tbody>
</table>
| SEX\text{\textunderscore}CD\text{\textbar}value     | Required             | Enter M or F                                          | M=Male  
F=Female                                                             |
| HOME\_ADDRESS\_LINE1\text{\textbar}value            | Required             | Family Member's home address street and suite/apartment/etc. number | 35 character max                                                          |
| HOME\_ADDRESS\_LINE2\text{\textbar}value            | Required             | Additional Address Information for Family Member      | 35 character max                                                          |
| HOME\_ADDRESS\_CITY\text{\textbar}value             | Required             | Family Member's Home City                             | 23 character max                                                          |
| HOME\_ADDRESS\_ST\text{\textbar}value              | Required             | Family Member's Home State                            | 2 character max                                                           |
| HOME\_ADDRESS\_ZIP5\text{\textbar}value            | Required             | Family Member's 5-digit zip code                      | 5 character max                                                           |
| MEDICARE\_A\_IND\text{\textbar}value               | Required             | Enter Y or N                                          | Y=Family Member currently has Medicare A  
N=Family Member does not currently have Medicare A                         | This field is required to be "Y" if the field for Medicare B is "Y"              |
<table>
<thead>
<tr>
<th>Data Field Label</th>
<th>Required/Not Required</th>
<th>Description</th>
<th>Comments</th>
</tr>
</thead>
</table>
| MEDICARE_B_IND|value                | Required | Enter Y or N  
Y=Family Member currently has Medicare B  
N=Family Member does not currently have Medicare B |                                                                                             |
| MEDICARE_D_IND|value                | Required | Enter Y or N  
Y=Family Member currently has Medicare D  
N=Family Member does not currently have Medicare D |                                                                                             |
| MEDICARE_NBR|value                | Required if any Medicare indicator is “Y” | Alphanumeric field for the Family Member’s Medicare Number | Must be in format: “NNNNNNNNNXX”  
N=Numeric  
X=Alpha |
| OTHER_THAN_MEDICARE_IND|value          | Required | Enter Y or N  
Y=Family Member has insurance other than Medicare  
N=Family Member does not have insurance other than Medicare | For “Y”: TRICARE_IND, Other_INSURANCE_IND, or FEHB_TRANSACTION_CD should be Y  
For “N”: so TRICARE_IND, Other_INSURANCE_IND, and FEHB_TRANSACTION_CD should all be N |
<table>
<thead>
<tr>
<th>Data Field Label</th>
<th>Required/Not Required</th>
<th>Description</th>
<th>Comments</th>
</tr>
</thead>
</table>
| TRICARE_IND|value | Required | Enter Y or N  
Y=Family Member currently has Tricare  
N=Family Member does not currently have Tricare |                           |
| FEHB_TRANSACTION_CD|value | Required | Enter Y or N  
Y=Family Member has FEHB  
N=Family Member does not have FEHB |                           |
| OTHER_INSURANCE_IND|value | Required | Enter Y or N  
Y=Family Member currently has other insurance  
N=Family Member does not currently have other insurance |                           |
<p>| OTHER_INSURANCE_NM|value | Required if OTHER_INSURANCE_IND is “Y” | The <strong>policy name</strong> for Family Member’s other insurance | 35 character max          |</p>
<table>
<thead>
<tr>
<th>Data Field Label</th>
<th>Required/Not Required</th>
<th>Description</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>OTHER_INSURANCE_POLICY_NBR</td>
<td>value</td>
<td>Required if OTHER_INSURANCE_IND is “Y”</td>
<td>The policy number for Family Member’s other insurance</td>
</tr>
</tbody>
</table>
| RELATIONSHIP_CD|value                  | Required                  | Family Member’s relationship to the Enrollee                                | 01=Spouse  
19=Child under age of 26  
09=Adopted Child  
17=Stepchild  
10=Foster Child  
99=Disabled child age 26 or older who is incapable of self-support |
| SSN_LINK|value                  | Required                  | Enrollee’s SSN that the Family Member is enrolled under                      | Example: 012345678  
No dashes allowed  
Include any leading zeros as illustrated in the example above |
## Appendix A: Glossary

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CLER</td>
<td>Centralized Enrollment Reconciliation Clearinghouse</td>
</tr>
<tr>
<td>CMB</td>
<td>Customer Management Branch</td>
</tr>
<tr>
<td>FEHB</td>
<td>Federal Employees Health Benefits</td>
</tr>
<tr>
<td>ISDEAA</td>
<td>Indian Self-Determination and Education Assistance Act</td>
</tr>
<tr>
<td>NFC</td>
<td>National Finance Center</td>
</tr>
<tr>
<td>OPM</td>
<td>Office of Performance Management</td>
</tr>
<tr>
<td>PADS</td>
<td>Preauthorized Debt System</td>
</tr>
<tr>
<td>POI</td>
<td>Personnel Office Identifier</td>
</tr>
<tr>
<td>PPACA</td>
<td>Patient Protection and Affordable Care Act</td>
</tr>
<tr>
<td>QLE</td>
<td>Qualifying Life Event</td>
</tr>
<tr>
<td>SF 2809</td>
<td>Standard Form 2809</td>
</tr>
<tr>
<td>SF 2810</td>
<td>Standard Form 2810</td>
</tr>
<tr>
<td>SME</td>
<td>Subject Matter Expert</td>
</tr>
<tr>
<td>TBO</td>
<td>Tribal Benefits Officer</td>
</tr>
<tr>
<td>TIPS</td>
<td>Tribal Insurance Processing System</td>
</tr>
<tr>
<td>TSO</td>
<td>Tribal Security Officer</td>
</tr>
<tr>
<td>USDA</td>
<td>U.S. Department of Agriculture</td>
</tr>
</tbody>
</table>
**TIPS Final Review**

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

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

3. What are the four primary functions of TIPS?

4. Each __________ will receive a separate Billing Report in TIPS.

5. The Final Billing Report closes at this time each month?

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

7. TIPS Reports can be viewed in what two ways?

8. Who is responsible for initiating and managing the creation of a Tribal Employer's TIPS user accounts?
9. In TIPS, which tab would you select in order to create an initial SF 2809?

10. In TIPS, which tab would you select in order to create a SF 2810?

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

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

13. What field(s) can you search by when performing an Inquiry in TIPS?

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

15. What information must you have in order to transfer an enrollee to a POI managed by your Tribal Employer?
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 ServiceNow Customer Service Portal.