NYSIF Online Account User Guide

Workers' Compensation Claimants & Beneficiaries Aggregate Trust Fund (ATF) Claimants & Beneficiaries Disability Benefits/Paid Family Leave Claimants (Includes Direct Deposit Instructions)

September 7, 2022

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Claimants without a Social Security Number cannot create a NYSIF online account.

WC = Workers' Compensation (on-the-job injuries)

ATF = Aggregate Trust Fund (on-the-job injuries, paid from the ATF)

DB = Disability Benefits (off-the-job injuries)

Please note if an application is mailed to NYSIF, the changes will not become effective until the application is both received and processed by NYSIF staff. Payments will continue to be sent to the bank account on file in the interim.

Create an Online Account

Go to nysif.com, click "Login" and choose "Create an Account" from the dropdown menu. All NYSIF recipients of claims benefits should **choose "Claimant/Beneficiary**" for the Account Type.



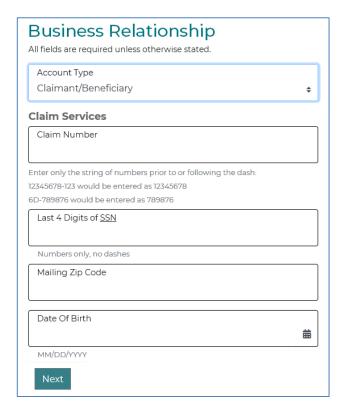
A NYSIF claimant is defined as one of the following:

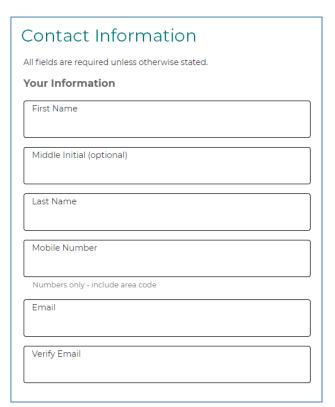
- Workers' Compensation or Aggregate Trust Fund (ATF) Claimant {person injured on the job}
- Workers' Comp or ATF Beneficiary {dependent of a worker killed on the job}
- Disability Benefits Claimant {individual injured off the job}

WC, ATF and DB Claimants

You will need:

- Your NYSIF claim number (You can find your claim number on correspondence or benefit check you've received from NYSIF.)
- The last four digits of your social security number
- Your mailing **Zip Code**
- Your **Date of Birth** (This field must be entered as mm/dd/yyyy format include zeroes if applicable.)
- **First Name**, **Middle Initial**, **Last Name** (If the claimant's middle initial is included on check payments, it must be included here.)
- Mobile Telephone Number
- A valid email address



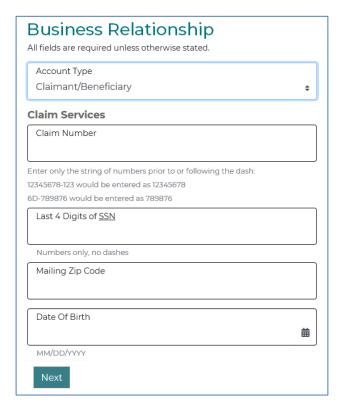


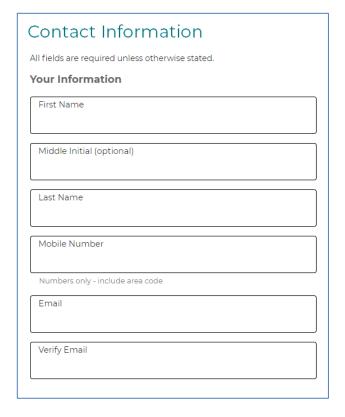
DB Claimants: Go to Page 4.

WC and ATF Beneficiaries

You will need:

- The **NYSIF claim number** of the deceased claimant (You can find the claim number on correspondence or benefit check you've received from NYSIF.)
- The last four digits of **your** (the beneficiary) social security number
- Your mailing Zip Code
- Your Date of Birth (This field must be entered as mm/dd/yyyy format include zeroes if applicable.)
- **First Name**, **Middle Initial**, **Last Name** (If the claimant's middle initial is included on check payments, it must be included here.)
- Telephone Number
- A valid email address
- If you are an ATF claimant or beneficiary having an issue registering for an online account, please contact your ATF Case Manager.



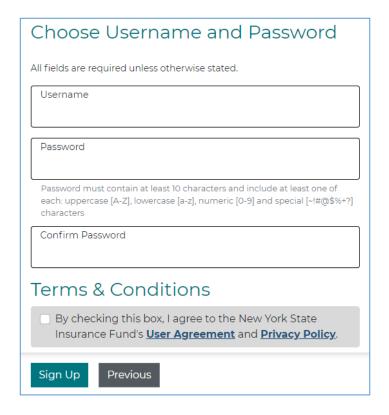


All Claimants and Beneficiaries – Final Step

Once you have completed your claim and contact information, you will be asked to create a **Username and Password.**

The password must contain at least 10 characters and include at least one of each: uppercase [A-Z], lowercase [a-z], numeric [0-9] and special $[\sim!\#@$\%+?]$ characters

The user must check the box for User Agreement and Privacy Policy. The Submit button will not be accessible until the box for the privacy agreement is checked. Upon "Submit," a confirmation screen will be displayed stating an email confirmation will be sent to the email address used to register.



Upon receipt of the email, click the link within to verify the account creation and complete the process.

Thank you for visiting NYSIF's website.

To finish the registration process, please click the following link:

https://www.nysif.com/signup/validateEmail.aspx?pgID=Act&t1=1451378&t2=53243000 If it does not work, please do a copy-and-paste of the above link into the URL Address area of your Web browser.

This is an automated message. Please do not reply to this e-mail message.

Enhanced Security (Multi-Factor Authentication)

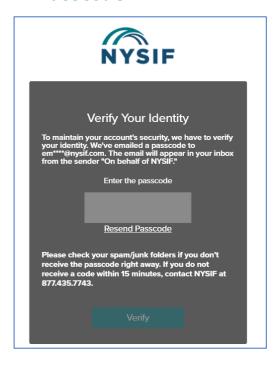
NYSIF takes your privacy seriously. To protect the personal information of its customers, including health records, NYSIF has implemented an enhanced security feature (also known as multifactor authentication) for all NYSIF online account holders. Enhanced security allows NYSIF to identify you as the true owner of your online account by adding a layer of protection against unauthorized access. We do this by sending you a one-time passcode, in addition to requesting your username and password.

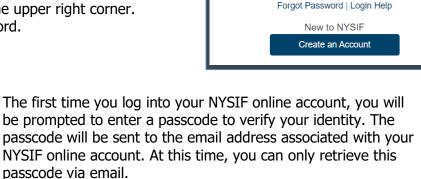
Please see the following screen shots for more information on how your account is enrolled in enhanced security.

LOGIN

- 1. Visit **nysif.com**. Click Login in the upper right corner.
- 2. Enter your username and password.

Passcode





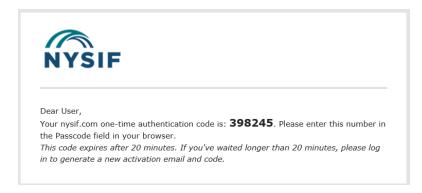
USERNAME

PASSWORD

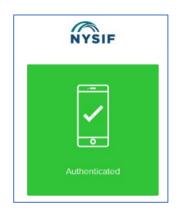
Login

Login

The passcode will expire after 20 minutes. The email will appear in your inbox from the sender **"On behalf of NYSIF."**



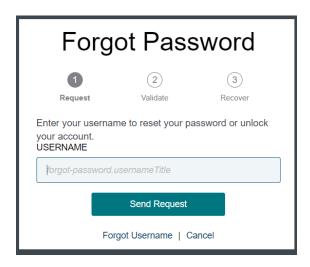
Enter the passcode in the field provided. Click "Verify." If authenticated, users will receive confirmation before being directed to their customer landing page or the application they were trying to reach.



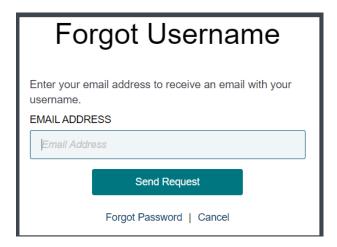
Online Account Management

Forgot Password or Username

I forgot my Password: Click LOGIN. Click NYSIF Login. Click the Forgot Password hyperlink. Enter your username to reset your password or unlock your account. Click the Send Request button. A temporary password will be sent to the email address associated with the online account.



I forgot my Username: Click **LOGIN**. Click **NYSIF Login**. Click the **Forgot Password** hyperlink. Next, select the **Forgot Username** hyperlink. Enter your email address to receive an email with your username. Click the **Send Request** button. Our system will send the username associated with that email address to the email address.



Verification Code Errors: Once the NYSIF website generates a Verification Code, you **must not** leave the verification page/screen to access the email. Doing so will invalidate the code sent and a new code will need to be generated by clicking the Resend Code option. Please check your spam/junk folders if you don't receive the passcode right away. If you do not receive a code within 15 minutes, contact NYSIF at 888-875-5790 and select option "5", followed by option "1", and then option "1" again to reach the NYSIF Service Desk for assistance.

Log In to Your NYSIF Workers' Comp/ATF Claimant Account

Log in to your account. Your account home page will display links of available services.



Direct Deposit

Enroll/Manage Direct Deposit

Direct Deposit User Guide

Payment Summary

Compensation Payment Summary

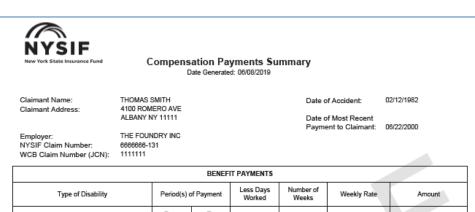
You are now logged-in.

The New York State Insurance Fund sells workers' compensation and disability benefits insurance. Claims are adjudicated by the Workers' Compensation Board, which is not a part of the New York State Insurance Fund.

Obtain a Compensation Payments Summary

The summary includes: type of disability paid (temporary or permanent), dates paid, number of weeks paid, weekly benefit rate and total amount paid.

This feature is not available for death claims.



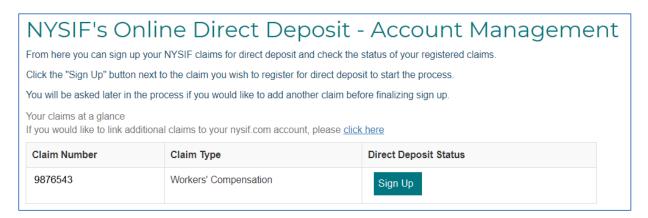
| | | BENEFI | T PAYMENTS | | | |
|------------------------------|------------|------------|---------------------|--------------------|-------------|-------------|
| Type of Disability | Period(s) | of Payment | Less Days Worked | Number of Weeks | Weekly Rate | Amount |
| | From | То | | | | |
| No Lost Time | 12/08/1999 | 12/09/1999 | 0 | 0.00 | \$0.00 | \$0.0 |
| Temporary Total Disability | 10/13/1999 | 12/08/1999 | 0 | 8.00 | \$215.00 | \$1,720.0 |
| Permanent Partial Disability | 11/19/1986 | 10/13/1999 | 0 | 673.00 | \$105.00 | \$70,665.0 |
| Temporary Total Disability | 07/15/1982 | 11/19/1986 | 0 | 226.80 | \$215.00 | \$48,762.0 |
| Temporary Total Disability | 02/15/1982 | 07/15/1982 | 0 | 21.60 | \$125.00 | \$2,700.0 |
| No Lost Time | 02/12/1982 | 02/15/1982 | 0 | 0.00 | \$0.00 | \$0.0 |
| Penalty | 0 | 0 | 0 | 0.00 | \$0.00 | \$3,990.2 |
| 15- | 0 | 0 | 0 | 0.00 | \$0.00 | \$-9,123.8 |
| No Lost Time | 12/08/1999 | 12/09/1999 | 0 | 0.00 | \$0.00 | \$0.0 |
| Temporary Total Disability | 10/13/1999 | 12/08/1999 | 0 | 8.00 | \$215.00 | \$1,720.0 |
| Permanent Partial Disability | 11/19/1986 | 10/13/1999 | 0 | 673.00 | \$105.00 | \$70,665.0 |
| Temporary Total Disability | 07/15/1982 | 11/19/1986 | 0 | 226.80 | \$215.00 | \$48,762.0 |
| Temporary Total Disability | 02/15/1982 | 07/15/1982 | 0 | 21.60 | \$125.00 | \$2,700.0 |
| No Lost Time | 02/12/1982 | 02/15/1982 | 0 | 0.00 | \$0.00 | \$0.0 |
| 15- | 0 | 0 | 0 | 0.00 | \$0.00 | \$-9,123.8 |
| | | | ' | • | Total: | \$233,436.5 |
| | | DED | UCTIONS | | - | |
| Payee | | | | Amount | | |
| SMITH & SMITH | | | | \$100.0 | | |
| ATTORNEY | | | | \$2,300.0 | | |
| OTHER | | | | | \$2,700.0 | |
| | | | | | Total: | \$5,100.0 |

WC/ATF Claimant & Beneficiary Direct Deposit Enrollment

Before Enrolling

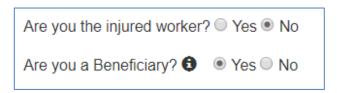
- Claimants that live outside the US must submit a paper direct deposit application.
- Claimants without a Social Security Number cannot create a NYSIF online account, and therefore cannot apply online, but they may contact their case managers to request a paper direct deposit application.
- Claimants that utilize a bank outside of the US banking system are not eligible for direct deposit.

To sign up for direct deposit, click the "Enroll/Manage Direct Deposit" link. The Direct Deposit – Account Management page will be displayed. Choose **Sign Up** to enroll.



After clicking the Sign Up button, NYSIF's Online Direct Deposit Sign Up page will be displayed.

The first question on this page is meant to determine whether the user is a claimant or a beneficiary.



Are you the injured worker?

 Is the individual a workers' compensation or aggregate trust fund claimant? If NO is answered to this question, the following question will display:

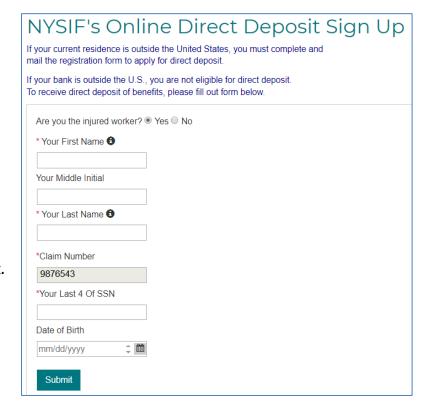
Are you the Beneficiary? (A beneficiary is a dependent receiving survivor's benefits following the death of an injured worker.)

 Is the individual a beneficiary of a workers' compensation or aggregate trust fund claimant? If YES is answered to this question, more information is required. See next page.

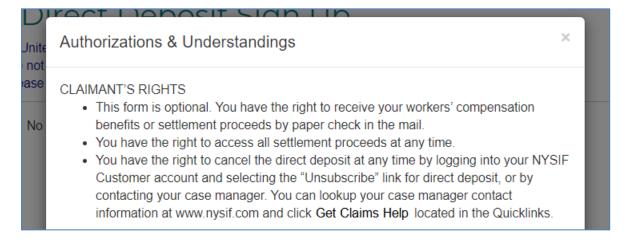
Are You The Injured Worker? YES

Please be sure to enter your first and last names exactly as they appear on the most recent check you received from NYSIF. This may mean that while your name has a hyphen or an apostrophe, it might not be represented as such in our systems.

- Your First Name
- Your Middle Initial is required when the name, as entered in the NYSIF claim system, also has the middle initial used. If a middle initial is not included but exists in NYSIF's records, an error message will be displayed
- Your Last Name
- **Claim Number** is a read-only field and can not be altered.
- Your Last 4 of SSN must be numeric values. These must match what was entered when the claim was registered for an online account.
- Date of Birth must be entered as mm/dd/yyyy format with leading zeroes for single digits. (ex. 06/03/1967)



Click Submit. A pop-up box with authorizations and understandings for the workers' compensation claimant will appear. Please review these carefully and choose "I Agree" to move forward with direct deposit.

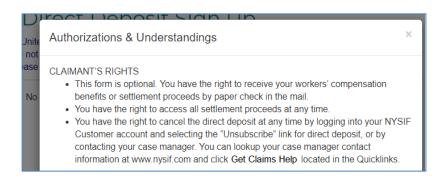


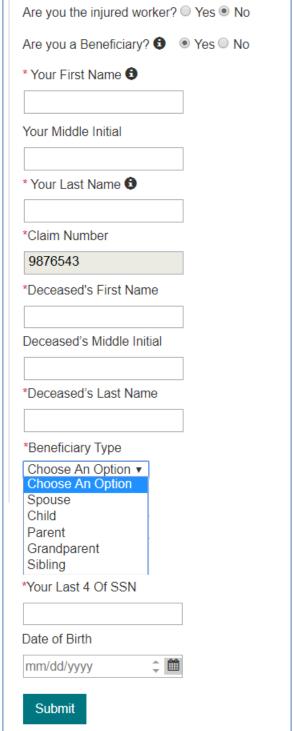
Are You The Injured Worker? NO Are You The Beneficiary? YES

Please be sure to enter your first and last names exactly as they appear on the most recent check you received from NYSIF. This may mean that while your name has a hyphen or an apostrophe, it might not be represented as such in our systems.

- Your First Name is the name of the beneficiary.
- Your Middle Initial is required when the name, as entered in the NYSIF claim system, also has the middle initial used.
- **Your Last Name** is the last name of the beneficiary.
- **Claim Number** is a read-only field and can not be altered.
- Deceased's First Name, Middle Initial, and Last Name refers to the individual for which the claim was opened. The name must be the same as what is already entered in the system and follows the same rules for the beneficiary's name as noted above.
- **Beneficiary Type** is a drop-down menu. This is the relationship of the deceased to the beneficiary. Options include Spouse, Child, Parent, Grandparent, Sibling.
- Your Last 4 of SSN must be numeric values. These
 must match what was entered when the claim was
 registered for an online account.
- Your Date of Birth is a required field. It must be entered as mm/dd/yyyy format with leading zeroes for single digits. (ex. 06/03/1967)

Click Submit. A pop-up box with authorizations and understandings for the workers' compensation claimant (beneficiary) will appear. Please review these carefully and choose "I Agree" to move forward with direct deposit.





Contact Information for WC/ATF Claimants & Beneficiaries

After successfully answering the Eligibility Determination questions the **Contact Information** screen will be displayed. On the this screen, the claimant/beneficiary's name, claim number and email address will be pre-populated from previous screens, and these fields will be designated as read only. Information for all other required fields must be entered to proceed.

- Address Line 1 will not accept PO boxes including APO and FPO addresses. The address will be stored; however, it will not update NYSIF's records.
- City, State, Zip
- **Day Phone** is required. The field will accept 10 numeric characters (no dashes).
- **Night Phone** is optional.



Financial Institution Info for WC/ATF Claimants & Beneficiaries

Optional: If you wish to split your payments between two bank accounts, complete both sets of bank related fields. The distribution percentage must total 100% (for example, 75% in account #1 and 25% in account #2). If, at any time, your bank account(s) becomes unavailable, payment will be sent via paper check.

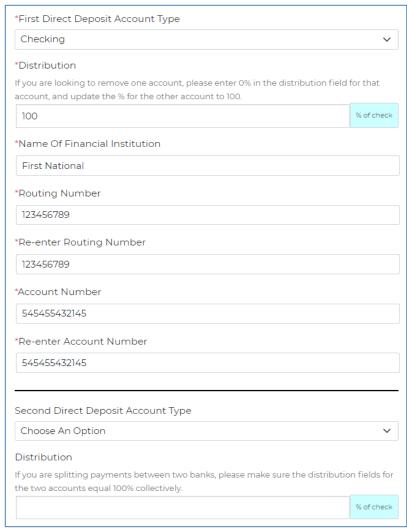
All fields are required:

- The Account Type is a drop down selectable menu with options of either Checking or Savings.
- Name of Financial Institution is the bank where the user has the related account.
- The Account Number must be between 4 and 16 characters and must be all numeric.
- The Routing Number is a 9-digit number on the bottom of all checks or deposit slips. The Routing Number identifies the financial institution.

If you want to direct your payments to only one financial institution, enter "100" in the distribution box for the First Direct Deposit Account Type.

Click Submit.

At the bottom of the Financial Institution Information page is Depositor/Payee Certification & Authorization language. The user is agreeing to this disclaimer by clicking the "Electronic Signing" button.



IN SIGNING THIS FORM, I AUTHORIZE MY NEW YORK STATE INSURANCE FUND PAYMENTS TO BE SENT TO THE FINANCIAL INSTITUTION NAMED ABOVE TO BE DEPOSITED INTO THE DESIGNATED ACCOUNT AT THE FINANCIAL INSTITUTION NAMED. I CERTIFY THAT I AM ENTITLED TO RECEIVE THE UNDERLYING COMPENSATION PAYMENTS OR SETTLEMENT PROCEEDS AND CIRCUMSTANCES ENTITLING ME TO BENEFITS HAVE NOT CHANGED. I AUTHORIZE THE NEW YORK STATE INSURANCE FUND TO DEBIT THE ACCOUNT IN ORDER TO RECOVER ANY CREDITS DEPOSITED IN ERROR BY ANY LAWFUL MEANS. I UNDERSTAND THAT THIS CONSENT DOES NOT AUTHORIZE THE NEW YORK STATE INSURANCE FUND TO RECOVER ALLEGED OVERPAYMENTS OF ESTABLISHED AND AWARDED BENEFITS. IN THE EVENT THAT CIRCUMSTANCES WHICH WOULD AFFECT ENTITLEMENT TO RECEIVE PAYMENTS HAVE CHANGED, I MUST NOTIFY NYSIF. *Clicking 'Electronic Signing' below will take you to DocuSign, our secure electronic signature agent.

DocuSign Info for WC/ATF Claimants & Beneficiaries

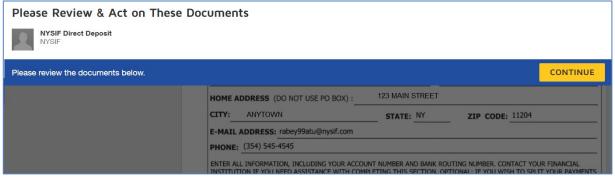
After clicking the Electronic Signing button, you will be asked to confirm that you wish to proceed with eSignature.

Click OK.

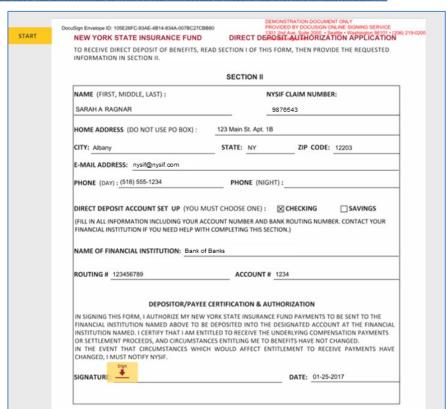




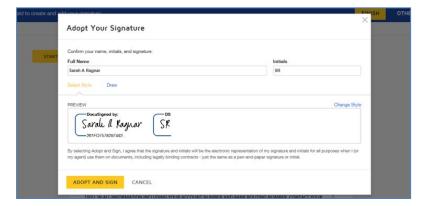
Click **CONTINUE** to display the document.



Choose the **yellow arrow** to sign.



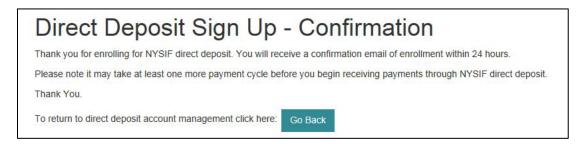
The screen will again gray out the document, and a pop-up box will open. The user must enter their full name in the corresponding field. DocuSign will convert the name into a signature. Once a signature has been created, click **ADOPT AND SIGN** to electronically sign the document.



DocuSign will insert the signature into the application document.



After the electronic signature appears on the image of the application, and all other information appears to be correct, **the user must click the yellow FINISH button.**



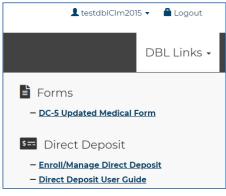
Once DocuSign is completed and accepted, a confirmation message will be displayed, and no further action is required from the user at this time. The user may click the Go Back button to return to Direct Deposit Account Management.

Log In to Your NYSIF DB/PFL Claimant Account

Log in to your account. Your account home page will display information about your claim.



Choose **"DBL Links"** to view other menu options.



View Details

Click "View Details" from your home page to see a summary of your benefit payments and a list of payments made.

Claim Detail Claimant: Mary Jones Benefit Rate: \$170.00 SSN: ***-**-6683 Weeks Paid: 3.75 Phone: (111) 234-5678 Paid to Date: \$637.50 Assured: ACME FENCE CO Last Check Date: 11/5/2019 Disability Date: 10/10/2019 Next Pay Date: **FICA** Check Check# Payee Liens Date Date Date Amt MARY JONES 10/31/19 11/7/19 \$297.50 \$7.80 \$0.00 \$289.70 11/5/19 712106 MARY JONES 10/17/19 \$340.00 \$26.01 \$0.00 \$313.99 711795 10/31/19 10/29/19

Obtain a DC-5 Updated Medical Form

If you need to download a new medical form to provide to your doctor, you can obtain one by logging in to your online account.

DC5-Updated Medical Form

To qualify for continued benefits, this form is required every 45 days.

Claimant Statement is to be completed by the claimant. Please be sure to answer all questions completely and sign and date the form.

Physician Statement is to be completed by the health care provider. Be sure your medical provider indicates an estimated return to work date. They should not indicate "unknown" or "undetermined", as this can delay your disability payments pending receipt of a defined date.

Download DC-5 Updated Medical Form

Once completed, the DC5 can be faxed to 518-437-5201 or mailed to:

Document Control Center NYSIF-Disability Claims 1 Watervliet Avenue Ext. Albany, NY 12206

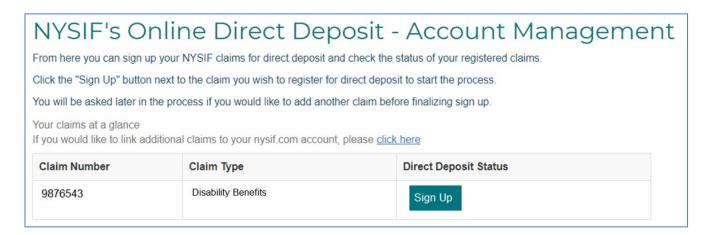
| NYSIF New York State Insurance Fund | | | | | | |
|--|---|-------|--|--|--|--|
| MAGGIE NYSIF 1234 NYSIF LANE MONTGOMERY AL 99999 | Claim Number: 7D-###### Claimant: MAGGIE NYSIF Disability Date: 2/13/2017 | | | | | |
| CLAIMANT STATEMENT | | | | | | |
| 1. Have you recovered from your disability: | VES or NO If yes, enter the date of recovery / MO/DAY/YR | | | | | |
| 2. Have you worked since your disability: | YES or NO If yes, enter the return-to-work date// | | | | | |
| I. MAGGIE NYSIF certify that the above statements are true and authorize my Physician to give to the New York State Insurance Fund all the information necessary to complete this form. | | | | | | |
| CLAIMANT SIGNATU | RE DATE | | | | | |
| | | | | | | |
| PHYSICIAN STATEMENT | | | | | | |
| 1. Date of current treatment: | | | | | | |
| PO/DAY/YR 2. Present diagnosis and/or complications: | | | | | | |
| 3. If pregnancy, delivery date:/ | ESTIMATED OR ACTUAL NATURAL OR C-SECTION CIRCLE ONE CIRCLE ONE | ION | | | | |
| 4. Date of OPERATION or BIOPSY:/ | J AY JYR | | | | | |
| ☐S. DATE CLAIMANT MAY RETURN TO WORK:/ | | | | | | |
| MO/ DAY/YR IMPORTANT: Even if considerable question exists, please make a reasonable estimate of the date you believe this patient will be able to perform their usual work. Terms like: "indefinite", "undetermined" or "unknown" will delay the processing of this claim pending the receipt of a defined date. It is understood that the date indicated by the physician may be modified upon re-evaluation. | | | | | | |
| ☐6. DATE OF NEXT SCHEDULED APPOINTMEN | T (RE-EVALUATION): | | | | | |
| PHYSICIAN SIGNATURE | DATE | | | | | |
| STREET ADDRESS | CITY STATE ZIP | _ | | | | |
| TELEPHONE FAX | PHYSICIAN LICENSE # OR STAMP | _ | | | | |
| | penefits, the Physician must complete all entries on this form and <u>fac</u> CC - Disability Claims • 1 Watervliet Ave Ext • Albany, NY 12206 | x to: | | | | |

Disability Benefits/PFL Claimant Direct Deposit Enrollment

Before Enrolling

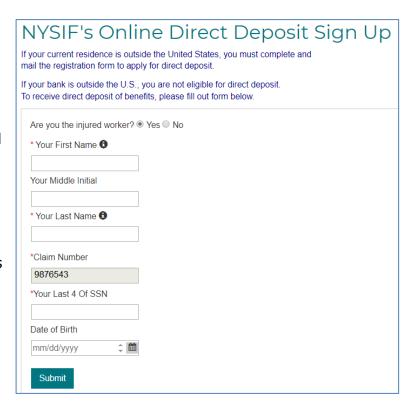
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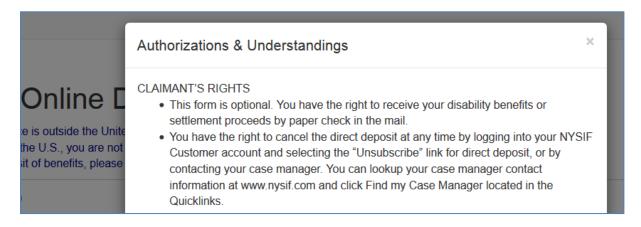


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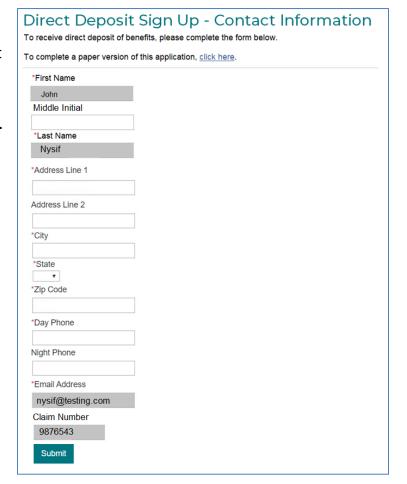
Click Submit. A pop-up box with authorizations and understandings for the disability benefits claimant will appear. Please review these carefully and choose "I Agree" to move forward with direct deposit.



Contact Information for DB/PFL Claimants

Next the **Direct Deposit Sign Up – Contact Information** screen will be displayed. On the Contact Information screen the claimant's name, claim number and email address will be prepopulated from previous screens, and these fields will be designated as read-only. Information for all other required fields must be entered to proceed.

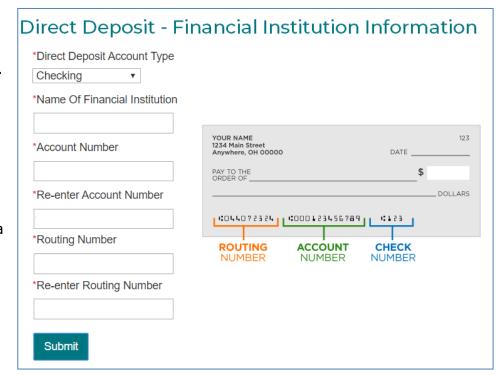
- Address Line 1 will not accept PO boxes including APO and FPO addresses. The address will be stored; however, it will not update NYSIF's records.
- City, State, Zip
- Day Phone is required. The field will accept 10 numeric characters (no dashes).
- **Night Phone** is optional.



Financial Institution Information for DB/PFL Claimants

All fields are required:

- The Account Type is a drop down selectable menu with options of either Checking or Savings.
- Name of Financial Institution is the bank where the user has the related account.
- The Account Number must be between 4 and 16 characters and must be all numeric.
- The Routing Number is a 9-digit number on the bottom of all checks or deposit slips. The Routing Number identifies the financial institution.



At the bottom of the Financial Institution Information page is Depositor/Payee Certification & Authorization language. The user is agreeing to this disclaimer by clicking the "Electronic Signing" button.

DEPOSITOR/PAYEE CERTIFICATION & AUTHORIZATION

IN SIGNING THIS FORM, I AUTHORIZE MY NEW YORK STATE INSURANCE FUND PAYMENTS TO BE SENT TO THE FINANCIAL INSTITUTION NAMED ABOVE TO BE DEPOSITED INTO THE DESIGNATED ACCOUNT AT THE FINANCIAL INSTITUTION NAMED. I CERTIFY THAT I AM ENTITLED TO RECEIVE THE UNDERLYING COMPENSATION PAYMENTS OR SETTLEMENT PROCEEDS AND CIRCUMSTANCES ENTITLING ME TO BENEFITS HAVE NOT CHANGED. I AUTHORIZE THE NEW YORK STATE INSURANCE FUND TO DEBIT THE ACCOUNT IN ORDER TO RECOVER ANY CREDITS DEPOSITED IN ERROR BY ANY LAWFUL MEANS. I UNDERSTAND THAT THIS CONSENT DOES NOT AUTHORIZE THE NEW YORK STATE INSURANCE FUND TO RECOVER ALLEGED OVERPAYMENTS OF ESTABLISHED AND AWARDED BENEFITS. IN THE EVENT THAT CIRCUMSTANCES WHICH WOULD AFFECT ENTITLEMENT TO RECEIVE PAYMENTS HAVE CHANGED, I MUST NOTIFY NYSIF.

*Clicking 'Electronic Signing' below will take you to DocuSign, our secure electronic signature agent.

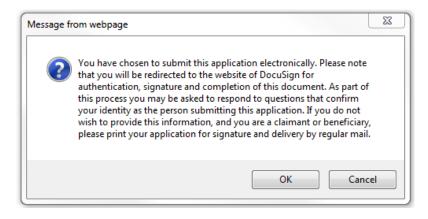
Electronic Signing

DocuSign Info for DB/PFL Claimants

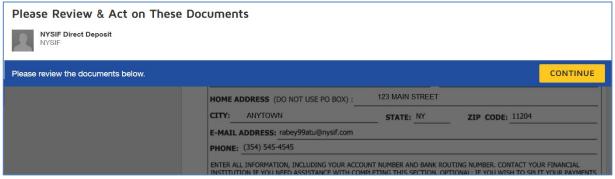
After clicking the Electronic Signing button, you will be asked to confirm that you wish to proceed with eSignature.

Click OK.

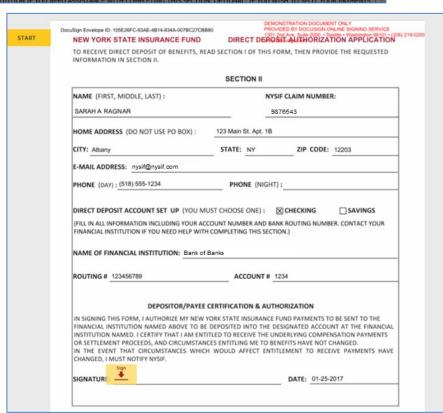




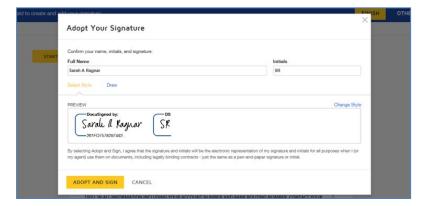
Click **CONTINUE** to display the document.



Choose the **yellow arrow** to sign.



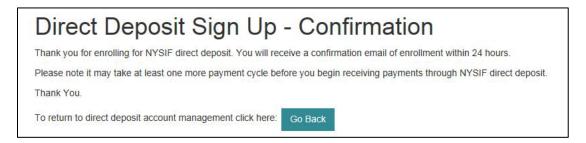
The screen will again gray out the document, and a pop-up box will open. The user must enter their full name in the corresponding field. DocuSign will convert the name into a signature. Once a signature has been created, click **ADOPT AND SIGN** to electronically sign the document.



DocuSign will insert the signature into the application document.



After the electronic signature appears on the image of the application, and all other information appears to be correct, **the user must click the yellow FINISH button.**



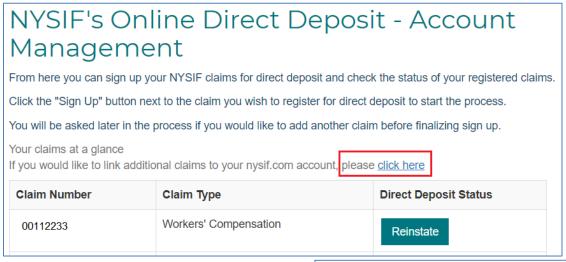
Once DocuSign is completed and accepted, a confirmation message will be displayed, and no further action is required from the user at this time. The user may click the Go Back button to return to Direct Deposit Account Management.

Managing Direct Deposit (All Claims)

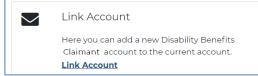
Whether a user signed up for direct deposit electronically or by paper, they will have the ability to manage their direct deposit information by logging into their online account. Online, users will be able to update bank account information, unsubscribe or reinstate their direct deposit.

Link Additional Claims

Choose "Enroll/Manage Direct Deposit" to reach the **Account Management** screen. Initially only the claim number used to register for an online account will be displayed. Here, claimants can link additional claims to their online account. They can then enroll multiple workers' compensation, ATF, or DB claims in direct deposit. Click the link at the top of the table to add additional claims.



You will be taken to your Administration Console. Choose "Link Account."



| Link New Account | | | | | | |
|--|---------------------------------|--|--|--|--|--|
| You are currently logged in as a Claimant under the username TestingXX. If you have DBL/WC/ATF Claim account with NYSIF you can add that to this online account. (If it does not already exist and is ready to be consolidated.) | | | | | | |
| Claim Services | | | | | | |
| ≟ Claim Number | | | | | | |
| | Enter numbers only (no dashes). | | | | | |
| * Last 4 digits of SSN | | | | | | |
| | Enter numbers only (no dashes). | | | | | |
| <u>∗</u> Zip Code | | | | | | |
| | Enter mailing zip code. | | | | | |
| * Date of Birth | | | | | | |
| Terms and Conditions | | | | | | |
| ■ By checking the box, I agree to the New York State Insurance Fund's <u>User Agreement</u> and <u>Privacy Policy</u> . | | | | | | |
| Submit | | | | | | |

On the Link New
Account page, you
can link any other
workers'
compensation,
aggregate trust fund,
or disability benefit
claims to your
Claimant online
account.

This step will validate that each claim is eligible to enroll in direct deposit. This is the same validation process that occurs when creating an online account.

- A valid Claim Number.
- The last 4 digits of the claimant's Social Security Number.
- The **Zip Code** must be the zip code on file for the claimant.
- **Date of Birth** must be entered as mm/dd/yyyy format with leading zeroes for single digits.
- The claimant must check the box for <u>User Agreement and Privacy Policy</u> and then click Submit.

Once submitted, the system will verify the entered information is acceptable, valid and correct.

New Account Added

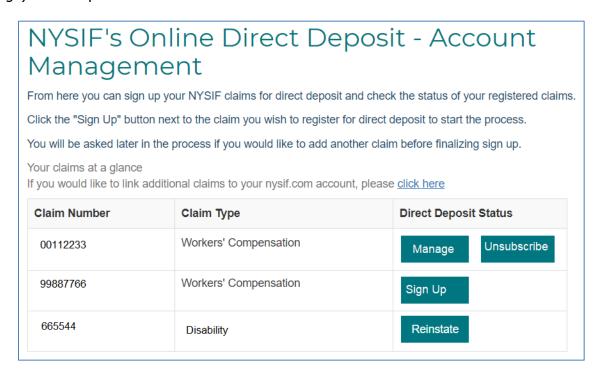
New claim has been added to your current Workers Compensation Claimant account. Now you may access Claim information for each of your NYSIF Claims with the common username - TesterXX

Return to the Admin Console.

Clicking the link to return to the Admin Console will allow the user to continue linking additional claims to the online account. This process may be repeated until all desired claims have been added. Additional open claims can be linked to the online account at any time.

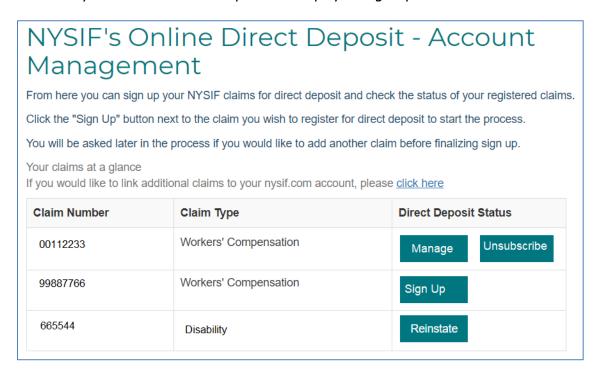
Each time an additional claim is linked to the account, a confirmation email will be sent to the address of the online account.

Once multiple claims are linked to the account, the Account Management page should display all linked claims. The Direct Deposit Status column will display the available options to enroll (or manage) direct deposit for each claim.



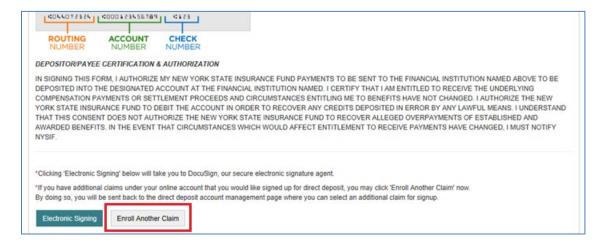
Enroll Multiple Claims in Direct Deposit

Once any additional claims are linked to the online account they can be enrolled in direct deposit. Any claims already enrolled in direct deposit will display "Manage" and "Unsubscribe" buttons. Any linked claims not yet enrolled in direct deposit will display a "Sign Up" button.

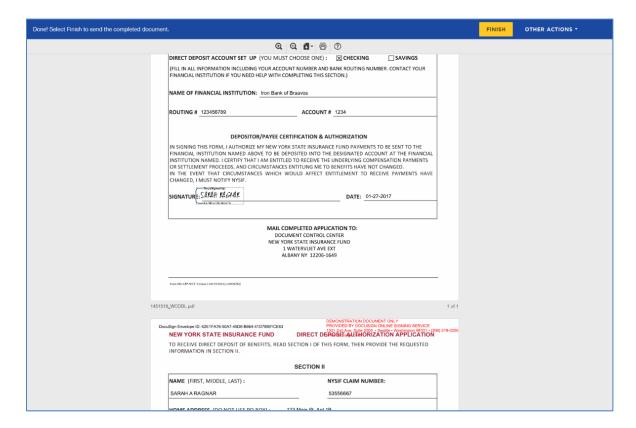


Click the <u>Sign Up</u> button next to the claim you'd like to enroll in direct deposit. This will follow the same procedure as your first claim. **Each claim enrolled in direct deposit may use a different bank account if desired.**

If multiple claims have already been linked to the online account, the Direct Deposit Sign Up – Financial Institution Information page will also display a button to Enroll Another Claim.

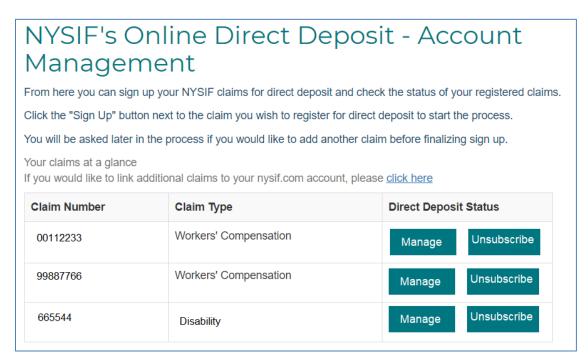


Clicking the <u>Enroll Another Claim</u> button will bring the user back to the Account Management page so that the user may select the next claim they would like to enroll. If multiple claims were enrolled at the same time, the user will enter an electronic signature on each separate Direct Deposit Authorization Application when completing the DocuSign process.



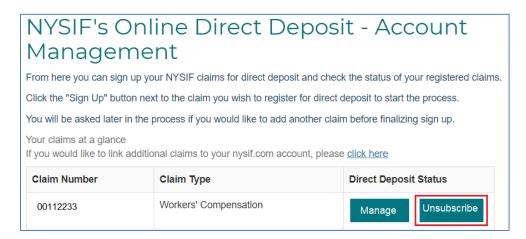
Click the yellow FINISH button to submit your application and complete enrollment.

Your Account Management page will now display Manage and Unsubscribe buttons in the Direct Deposit Status column.



Unsubscribe Direct Deposit

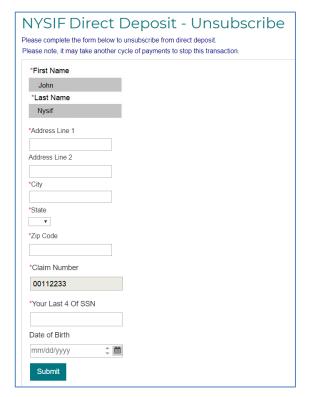
To remove a claim from direct deposit, choose "Unsubscribe" from your Account Management page.



This will bring the user to NYSIF's Online Direct Deposit – Unsubscribe page. In order to remove the selected claim from direct deposit, the user must verify their name, the last 4 digits of their SSN, and their date of birth.

Click the Submit button after all information is entered. After the unsubscribe process has been completed, a confirmation message will display and an email will be sent to the address on file.





We have received your request to unsubscribe from NYSIF direct deposit payments. It may take another cycle of payments to stop this transaction, after which your next scheduled payment will be mailed to the address we have on file.

Thank you.

Sincerely,

NYSIF Online

http://www.nysif.com/

Update Direct Deposit Information

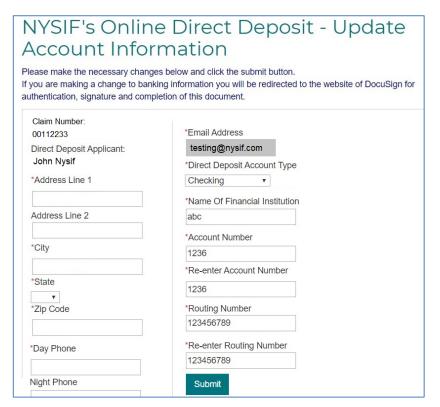
To update the bank account information for a claim enrolled in direct deposit, click the **Manage** link on your Account Management page.



This will bring the user to NYSIF's Online Direct Deposit – **Update Account Information** page where the user can update their address or bank account information.

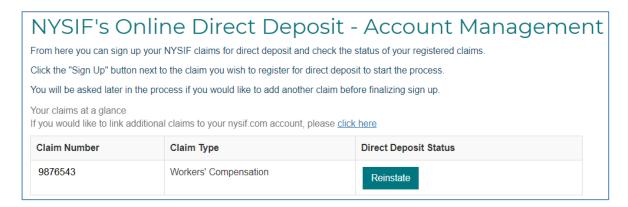
Please note any changes to bank account information will require another signed application. Changes will not be saved until an electronic signature is provided or a paper application is mailed to NYSIF.

Clicking Submit will bring the user to DocuSign. After the submitted updates have been electronically signed in DocuSign, the user will see a confirmation message and receive a confirmation email.



Reinstate Direct Deposit

To re-enroll one of your claims in direct deposit, click the Reinstate button from your Account Management page.



From here reinstating direct deposit will follow the same path as the initial Direct Deposit Sign Up process.