Adding a New Group After 4/1/18 & Navigation of the Eligibility Landing Page

Beginning April 1, 2018, small employers in New York State will be able to enroll in NYSOH SHOP-certified qualified health plans (“QHPs”) directly with insurers, or through their broker/navigator, and still receive the Small Business Health Care Tax Credits, if otherwise eligible. Due to this change, the functionality of the Employer Portal has changed. Businesses who are new to NYOSH (or had a previous NYOSH account and were not active on April 1, 2018) on or after April 1, 2018 will not have the ability to enroll through the old NYOSH SBM system.

New groups must go through the new NYOSH SBM eligibility determination system to establish if they are a SHOP eligible employer group. To be a SHOP eligible employer, a business or non-profit organization must have a physical business location in New York State and have between 1 and 100 full-time equivalent employees.

1. To begin, log into your Broker Portal and navigate to the My Clients tab. Click the Add New Employer button.
2. Now, when adding a new Employer, an Attestation will appear that will take the place of a BOR. A BOR will no longer need to be uploaded to the NYSOH. It may still be required when enrolling the group directly with the Issuer.

Check the checkbox to attest that you are authorized to do business on behalf of the small group employer.
3. Once the Attestation is checked the next section, Business Contact Information, will populate. Here, enter the Small Business Contact Information including the Account Holders Name (does not have to be the business owner), their Email Address, Business Phone Number, Legal Company Name and EIN. Click Verify once complete.
➢ There may be red errors alerting to something that could be entered incorrectly such as mismatched email addresses, Legal Name and Company EIN do not match, etc. Ensure any errors are corrected and try again. If you get an error that the EIN and Company Name do not match, double check the information is correct (spelling, capitalization and punctuation), if all is correct, click the *attestation checkbox* that the Company Name and EIN are correct as entered. Once attested, the next field in the Eligibility Determination Form will populate.
4. Once the Company Information is verified, or attested to, a green checkmark will appear next to the EIN. Under that, the Primary Address fields will populate. Complete the Primary Business Address fields.

➢ Answer the question under the Primary Address that asks if the Business Mailing Address is the same as the Primary Address entered. If No, additional fields to enter the Business Mailing Address will populate. If Yes, the system will populate the next section of the SHOP Eligibility Determination Form.

5. The next section for completion is the Full Time Equivalent (FTE) Calculator. If the FTE count is unknown, click the blue FTE Calculator link to the right of the box.
This will open the calculator for the user to get the FTE count by adding the full-time employees (employees who work an average of 30+ hours per week) as well as the combined hours worked by the company’s part-time employees. Once the calculation is complete, the FTE count will appear on the Eligibility Form and the next section will populate.

6. The next section to populate is the Eligible Employee’s section. Enter the number of employee’s that are eligible to enroll in insurance through the employer plan. Enter all eligible employee’s including Full-Time and Part-Time employees, as well
as any Seasonal workers who work more than 120 days per calendar year. Once
the number is entered, the first attestation will appear.
7. The first Attestation is that the business has a physical location in NYS. Select Yes or No.
➢ If No is selected, a warning message will appear that a business MUST have a physical location in NYS to be eligible. Click in the box to confirm that the business is not eligible for SHOP coverage.
8. Once the first attestation is complete, the second attestation will appear. The second Attestation asks to confirm if the business has between 1-100 Full-Time Equivalent Employees. Select Yes to confirm or No if the business does not have between 1-100 FTE’s. Note: if the business has only 1 part-time employee and they are eligible to enroll in employer sponsored coverage, select Yes to continue.

➢ If no is selected, a message will appear that the business MUST have between 1-100 FTE’s. Click the box to confirm that the business is not eligible for SHOP coverage.
Eligible Employees
Number of Eligible Employees
106

Attestation
This business has a physical location in New York State.
☐ Yes  ☐ No

This business has between 1 and 100 FTE (Full Time Equivalent) employees.
☐ Yes  ☐ No

A business MUST have between 1 and 100 FTE employees to be eligible.

IMPORTANT: Your business is NOT ELIGIBLE to enroll in SHOP coverage.
If your business does have between 1 and 100 FTE’s, you can change your answer to the attestation above and continue with your application, or you can confirm that you do not have between 1 and 100 FTE’s by clicking the check box below.

☐ I confirm this business is NOT currently eligible for SHOP coverage.
9. Once the Eligibility Determination Form is completed, click *Submit.*
10. The NYSOH then brings you to the Eligibility Determination Landing Page. In the center of the page is the SHOP Document History. This is where the determination will appear once the form is submitted. Click the open/print icon next to the eligibility determination you would like to view.

![Document History Image]

Click here to mail the most recent SHOP Eligibility Determination Letter to my business mailing address.

Ready to enroll in coverage?
You can work with a SHOP certified broker/navigator or enroll directly through an insurance carrier.

To be eligible for the tax credit you must enroll in a SHOP certified plan.

- Browse SHOP certified plans and prices
- View contact information for SHOP certified insurance carriers
- See if you qualify for the small business tax credit
- View small business tax credit calculator

SHOP Navigation
- Edit Employer Information - Submit Eligibility Determination
- Return to Agent Portal
Features of the Eligibility Landing Page

- **Edit Employer Information** - takes the user to the Eligibility Determination Form. Any edits made to the form, including updating or correcting any company information (including attestations) will generate a new eligibility determination letter in real time.

- **SHOP Document History** - displays all Eligibility Determination Letters with the most recent displaying first. If the business was previously enrolled with the NYSOH, the Eligibility Determination Letter will automatically display and will not need to be resubmitted. Past Messages and Notices can be viewed in the businesses old portal (Legacy Portal).

- **Click here to mail the most recent SHOP Eligibility Letter to my business mailing address** - will turn to a green checkmark once clicked. The most recent eligibility determination letter will be mailed via USPS to the business mailing address on file. This link may be clicked once per login.

- **...Enroll directly through an insurance carrier** - produces a list of all of the SHOP participating insurance carriers and their contact information.

- **Browse SHOP Certified Plans and Prices** - opens a new window to the Anonymous Shopping tool. All SHOP certified plans and rates will now display per zip code entered.

- **View Contact Information for SHOP Certified Plans** - produces a list of all the participating insurance carriers and their contact information.

- **See if you Qualify for the Small Business Tax Credit** - opens a new window to the IRS website and displays all of the Small Business Tax Credit guidelines.

- **View Small Business Tax Credit Calculator** - will open the current NYSOH Small Business Tax Credit Calculator which will estimate the tax credit the business may receive.

- **Edit Employer Information/Submit Eligibility Determination Form** - brings the user back to the Eligibility Determination Form. Any changes made to the form will result in a new eligibility determination for the business. The new Eligibility Letter will display in the SHOP Document History and can be viewed/printed instantly.

- **Access Legacy Account** - (not seen in screen shot) appears only when the business had a previous account through the NYSOH. This is for the user to view and manage any and all features of an enrolled account. If there are no current enrollments in the Legacy Account, the account will turn to “view only” and no changes will be permitted.

- **Return to Agent Portal** - brings the Broker back to their Broker Portal.