

How to Add a New Hire Employee

1. From the Company Roster, click *Add Employee*.

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Company Roster

In order to participate in the Small Business Marketplace, you must list all eligible employees on your company roster. Employees must be listed even if they are not electing coverage. Business owners are eligible and should be listed on the roster.

The address listed for employees should be their residential address.

There are two ways to enter your employee information:

1. You can download a template, fill it out and upload it to the Small Business Marketplace or
2. You can enter your employee information one at a time.

Use Template

Add Individually

Download Roster Template

Choose File No file chosen

Add Employee

Manage Roster Instructions:

Instructions - Choose one of the options below if you want to change the information in your roster.

1. Click EDIT or FIX ERROR to change that employee's information, then click SAVE.
2. Click X to remove an employee record.
3. Click DELETE ALL ERROR ROWS to delete all incorrect information in the roster. You will need to input the corrected information or the employee will not be offered insurance.

2. Enter employee information and choose a date of hire. Hover text will help to determine what date of hire you should enter for the new employee.

The screenshot shows the 'Add Employee' form. On the left is a navigation menu with options: Employer Details, Contact Preferences, Company Information, Additional Contact, Employee Details, Company Review, and Company Confirmation. The main form area is titled 'Add Employee' and includes the following fields: 'Employee Details' (Mandatory Field), 'First Name *', 'Last Name *', 'Suffix' (dropdown), 'Phone Number *' (formatted as () - x Ext.), 'E-mail Address', 'Social Security Number *' (formatted as - -), and 'Employee Code *'. Below the 'Employee Code' field is the 'Hire/Eligible Date *' field with a calendar icon. A tooltip is displayed over the 'Hire/Eligible Date' field, containing the text: 'During Open Enrollment period, you can only add employees who have a date of hire that occurs before the end of the Open Enrollment period.' Below the tooltip is the 'Avg. Hrs/Week *' field.

- During the Open Enrollment period, you can only add employees who have a date of hire that occurs *before* the end of the Open Enrollment period; after Open Enrollment ends and throughout the employer’s plan year, you can add new hire employees here.
- Depending on the hire date you choose and the current enrollment period (open, edit, retro), you may see a number of error messages informing you that a specific hire date is not allowed for this group. Some of the error messages are described below:

During the open enrollment period, you will see a hire date **validation error** if you try to add an employee with a new hire date that occurs after the employer’s open enrollment period.

This close-up shows the 'Hire/Eligible Date *' field with the date '12/01/2014' entered. Below the field is a red error message box that reads: 'You cannot add an employee with a date of hire that occurs after the end of your Open Enrollment period. Please wait and add this employee after your Open Enrollment period has ended.'

During the edit and retroactive enrollment periods, you will see a hire date **validation error** if you choose a hire/eligible date that is beyond the month of the hire date or before the month prior to the hire date.

Hire/Eligible Date * ⓘ

11/24/2014 📅

It is too early to add this newly hired employee. You may only add a newly hired employee/newly eligible employee in the month prior or month of the hire date.

You will see a hire date **validation error** if you enter a hire date beyond the current month end date and the employer has not yet created any enrollment offering.

Hire/Eligible Date * ⓘ

10/06/2014 📅

You cannot add this employee at this time. The date of hire cannot be after the end of the current month.

3. When you have entered the required employee details with an acceptable hire date, click *Add*.

This is a unique employer supplied ID number

Hire/Eligible Date * ⓘ

📅

Avg. Hrs/Week *

📅

Mailing Address

Address Line 1 * Address Line 2

📅 📅

City * ZIP Code * County * State *

📅 📅 --Select-- --Select--

Back Add

4. After you Add employee, the **Company Roster** page will display and you will see that the employee has been added. Click *Create Enrollment*.

Filter Roster

Show All ▼ Delete All Error Rows >> Delete Roster

1 to 4 of 4 Entries < Previous Next >

Status	Employee Code	Employee Name	E-Mail Address	Address	Participation Code	Actions
+ Edit	01	Joel First	nyshtesting@gmail.c...	1 Plum Drive, Albany, NY 12084	7OAAao2VTMA	Delete
+ Edit	02	Jody Second	nyshtesting@gmail.c...	2 Cherry Lane, Albany, NY 12084	nX-TUU_ivHE	Delete
+ Edit	03	Jed Third	nyshtesting@gmail.c...	3 Peach Circle, Albany, NY 12084	mHxDJ0Yh8Yw	Delete
+ Edit	04	Larry Saunders	nyshtesting@gmail.c...	88 Cherry Lane, Albany, NY 12041	Not yet offered	Delete

Create Enrollment

- On the **Select Employment Classes** page, you can either select an existing class to add the new hire employee to, or create a class and assign a waiting period criteria to that class.

Please note: you can only create a new class if you are in the open enrollment period.

Select Employment Classes

My Dashboard

Class Options

- All employment classes, complete with defined new hire waiting periods, premium contributions amounts and plan offerings, must be set up when you complete your initial plan offering for the year. You will **not** have the ability to create new employment classes until your next renewal Open Enrollment period.
- To create an employment class, click **Add Class**, select one of the class names from the drop-down menu and then select the New Hire Waiting Period you want to define for that employment class. You can then assign employees into that selected class by using the >. Employees can be moved from one class to another only up until the time you have completed your enrollment offer. This process should be repeated for each employment class you want to create.
- If you opt not to set up separate employment classes, all employees on your roster will be added to the default class titled **Employees not classified**. You **MUST** select a New Hire Waiting Period for this default class.
- The New Hire Waiting Period is used to determine when your employees are eligible to enroll in your employer sponsored plan. After your plan's initial Open Enrollment, the new hire waiting period criteria you have selected, by employment class, will be used to determine the enrollment period and the effective date of coverage for all newly hired or newly eligible employees.
- To view the effective coverage start date for employee(s) in a selected class, select the **Show Effective Date** button.

COBRA Options

- If this is your initial Open Enrollment in the Small Business Marketplace, and you have existing COBRA participants that you wish to offer an enrollment opportunity, you will need to set up a COBRA class on this screen and assign the COBRA participants to this COBRA class.
- If you already have employees enrolled in the Small Business Marketplace, the COBRA enrollment process is different. You will need to terminate the employee coverage for a reason that triggers COBRA eligibility, and at that point, a separate COBRA enrollment process is initiated.

Class Options Manage Classes

Class Name	New Hire Wait Period
<input type="radio"/> Employees not classified	
<input checked="" type="radio"/> Executive staff	Date of Hire
<input checked="" type="radio"/> Hourly staff	First of the month following Date of Hire
<input type="radio"/> Other	First of the month following 60 days from Date of Hire
<input type="radio"/> Non-Exempt Staff	First of the month following 60 days from Date of Hire
<input checked="" type="radio"/> > Union	First of the month following 30 days from Date of Hire
<input checked="" type="radio"/> Non-Management	First of the month following 60 days from Date of Hire
<input type="radio"/> Part time staff	First of the month following Date of Hire

New Hire Wait Period:

First of the month following 30 days from Date of Hire ▾

Employees in not classified Class

Larry Saunders(04)

➔

➔

Employees in Selected class

Show Effective Date

Back to My Employers
Next >>

Add to Existing Class

1. If you choose to add the new hire to an existing class, select that class and move the new hire into that class. You can select *Show Effective Date* if you want to confirm employee's start date for coverage. Click **Next**. You will then be able to review the enrollment offering.

New Hire Wait Period:
First of the month following 30 days from Date of Hire

Employees in not classified Class | **Employees In Selected class**

Larry Saunders(04)

Show Effective Date

Effective coverage start date for Employee(s) in this class:

Employee Name	Effective start date
Larry Saunders	12/01/2014

< Previous Next >

Back to My Employers | Next >>

Add New Class (only during open enrollment period)

To add a new class, click on *Manage Classes* from the **Select Employment Classes** page and then click on *Add Class*.

Class Options | **Manage Classes**

Class Name	New Hire Wait Period
<input type="radio"/> Employees not classified	
<input checked="" type="radio"/> Executive staff	Date of Hire
<input checked="" type="radio"/> Hourly staff	First of the month following Date of Hire
<input type="radio"/> Other	First of the month following 60 days from Date of Hire

Select An Existing Class *

-- Select -- | Delete Class | Rename Class | **Add Class**

<< Back

Select a name for the class from the drop down menu. A class description can be added if desired. If you choose the class "Other", you must add a description.

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Add a new employment Class

On this page, you can create multiple employment classes. When you have selected the class name, entered the class description (if desired), assigned employees into their employment classes, designated the new hire waiting period for each class, then click NEXT to proceed.

Name the Class *

- Select--
- Select--
- Executive staff
- Exempt staff
- Non-Exempt Staff
- Full time staff
- Hourly staff
- Management staff
- Other
- Part time staff
- COBRA
- Salaried
- Union
- Non-Union
- Non-Management

Class Description

Next

Select waiting period criteria for the new hire employee from the drop down menu. Click *Next*.

Add a new employment Class

On this page, you can create multiple employment classes. When you have selected the class name, entered the class description (if desired), assigned employees into their employment classes, designated the new hire waiting period for each class, then click NEXT to proceed.

Name the Class *

--Select--

Class Description

New Hire Wait Period:

- Select--
- Select--
- Date of Hire
- First of the month following Date of Hire
- First of the month following 30 days from Date of Hire
- First of the month following 60 days from Date of Hire

Next

From the **Manage Employee Classes** screen, choose the new class you created in the drop down menu.

Manage Employee Classes

- All employment classes, complete with defined new hire waiting periods, premium contribution amounts and plan offerings, must be set up when you complete your initial plan offerings or subsequent renewal offerings.
- You will not have the ability to create new employment classes other than during Open Enrollment periods.
- To create an employment class or change existing employment class, click "Manage Classes". You will then be able to Add, Delete or Rename classes. For additional instruction, [click here](#).
- If you opt not to set up separate employment classes, all employees on your roster will be added to the default class titled "Employees not classified". If you do not select a New Hire Waiting Period, the system will default this class to "First of the month following Date of Hire".
- The New Hire Waiting Period, by employment class, will be used to determine the effective date of coverage for newly hired or newly eligible employees.

COBRA Options

- If this is your initial Open Enrollment in the Small Business Marketplace, and you have existing COBRA participants that you wish to offer an enrollment opportunity, you will need to add a COBRA class here and assign the COBRA participants to this COBRA class.
- If you had former employees enroll in COBRA during a previous Small Business Marketplace plan year, these names will automatically be assigned to the COBRA_INTERNAL class.

Select An Existing Class *

-- Select --

-- Select --

Employees not classified

Management staff

Salaried

Hourly staff

Exempt staff

Delete Class

Add Class

You will be able to add the new hire employee to the new class you created by using the arrows to move the employee from “Employees not in a class” to “Employees in this class”. When you are finished assigning the employee to the new class, click *Save*.

The screenshot shows a web interface for managing employee classes. At the top, there is a dropdown menu labeled "Select An Existing Class *" with "Exempt staff" selected. To the right of this dropdown are two buttons: "Delete Class" and "Add Class". Below this, there are two columns: "Employees not in a Class" and "Employees in this class". The "Employees not in a Class" column contains a list with "Frosty Snowman(06)" and "Maeve Tully(02)". Between these two columns are two arrows: a right-pointing arrow (highlighted with a red box) and a left-pointing arrow. The "Employees in this class" column is currently empty. At the bottom left, there is a button labeled "<< Back to Employee Classes", and at the bottom right, there is a "Save" button.

6. Whether you are adding to an existing class or creating a new class, when you finished assigning the employee, click *Back to Employee classes*.

This screenshot shows the same interface as the previous one, but with the dropdown menu set to "-- Select --". The "Delete Class" and "Add Class" buttons are still present. The "Employees not in a Class" and "Employees in this class" columns are empty. The button "<< Back to Employee Classes" is highlighted with a red box, indicating it is the next step in the process.

7. Back on the **Select Employment Classes** page, you can view the effective date of the employee you just added. IF YOU CREATED A NEW CLASS, you must proceed with creating an enrollment offering for this class. If so, click the radio button next to the new class and click *Next*. See “How to Create an Enrollment Offering” to proceed.

Class Name	New Hire Wait Period
<input type="radio"/> Employees not classified	
<input checked="" type="radio"/> > Management staff	Date of Hire
<input type="radio"/> Salaried	Date of Hire
<input type="radio"/> Hourly staff	First of the month following 30 days from Date of Hire
<input type="radio"/> Exempt staff	First of the month following Date of Hire

New Hire Wait Period:

Date of Hire

Employees in not classified Class

Employees In Selected class