

How to Add a New Hire Employee

1. Click the *My Clients* tab. From the Employer tab, select the *Agency* to which the employer group belongs. Select the *Manage* link for the Employer group.

AC0000050211 - Christa Smith

State Unique ID: 2017EIT License: EIT2017 Certification: SI00140 [View](#) Expiration: 2019-03-29 Status: Approved

Overview My Profile **My Clients** My Inbox Documents Address History Useful Links

Manage Clients [collapse](#)

Employer Employee Individual

Search Employer

Select your Agency or Direct Clients from the drop down to view all associated Employers or click "Add New Employer" to start a new Employer application. Within the search result, you can search my client list by entering text in the filter or by sorting by column name.

Select Associated Agency*
testnew

Filter Option
Show All

[Add New Employer](#)

Filter: Show 50 entries

Results: 1 to 4 of 4

Company Name Primary Contact Name	Account ID Contact Number	No. of Employees	Eligibility Status	Enrollment Status	Renewal Date	Action
Din Warehouse Caroline Reynolds	AC0000050843 518-555-1212	0	PENDING	N/A	N/A	eligibility delete
Five Guys Christa Johnson	AC0000034280 518-555-1212	12	ELIGIBLE	COMPLETED	06/01/2018	manage delete
Line of Linen Bennen Jerry	AC0000058491 518-555-1234	0	ELIGIBLE	N/A	N/A	manage delete
Little Black Dress Lisa McDowell	AC0000058336 516-555-1212	0	ELIGIBLE	N/A	N/A	manage invite delete

[Export CSV](#)

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2. Click the *Access Legacy Account* link at the bottom of the screen under SHOP Navigation. Select the *Plan Year* and click the *Continue* button (not shown).

Five Guys **AC0000034280**

Broker of Record: Christa Smith Invitation Code: 1431693890885

Agency Affiliation: testnew

NY State of Health Small Business Marketplace (SHOP) provides access to quality, affordable health and dental insurance for small businesses and their employees. SHOP plans are offered by private insurance companies and cover essential health benefits and pre-existing conditions.

To review/print or mail your eligibility determination, select the letter below. Please keep this letter with your business records and be sure to provide a copy to your tax preparer. If you need to update your Employer information, click on [Edit Employer Information](#) to make changes and generate a new letter.

SHOP Document History

Document	Determination Date	Open to View/Print
Eligibility_Letter_2018	04/05/2018 - 12:03:44	Open/Print
Eligibility_Letter_2018	03/28/2018 - 14:29:59	Open/Print

[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](#)
- > [Access Legacy Account](#)
- > [Return to Agent Portal](#)

- From the Employer's **Overview**, click the *Roster* tab on the left-side navigation menu.

ACCOUNT HOLDER INFORMATION

Account Number:
AC0000034280
Christa Johnson
Account Settings

COMPANY INFORMATION Edit

Five Guys
EIN: 712345696
726 EIT Street
Albany NY 12203
Primary Phone:
(518) 555-1212

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Account Overview

Plan Year: Jun 1, 2018 to May 31, 2019

- To create enrollment offerings for the next plan year or to renew your existing enrollment offering(s), please go to the "Roster" link on the left hand task bar. Please check the **Messages & Notices** link on the left hand task bar for updates and important communications from the Small Business Marketplace.
[Show More](#)

Group Effective Date - 06/01/2018

Employer Group Settings

Open enrollment start date: 01/01/2018 Open enrollment end date: 04/30/2018

Health coverage options and riders

Cover domestic partners	Yes
Qualified Religious Organization (exclude coverage for family planning and counseling services)	No

Marketplace Eligibility Status

Business eligible for Small Business Marketplace

Messages & Notices **92**

⚠ You have 92 unread notice(s) in your Messages & Notices Inbox.

Employees Enrolled

[View Details](#)

4. To add a newly hired or newly eligible employee individually, click the *Add Employee/Retiree/COBRA* button. If multiple new employees need to be added, the Roster template can be used without disruption to the existing roster – see the **How to Add an Employee Using the Template** section at the end of the document.

Company Roster

Plan Year: Jun 1, 2018 to May 31, 2019 ▼

ACCOUNT HOLDER INFORMATION

Account Number:
AC0000034280
Christa Johnson
Account Settings

COMPANY INFORMATION Edit

Five Guys
EIN: 712345696
726 EIT Street
Albany NY 12203
Primary Phone:
(518) 555-1212

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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
2. You can enter your employee information one at a time.

Download Roster Template

Choose File No file chosen

(OR)

Add Employee/Retiree/COBRA

Add Dependent COBRA Beneficiary

Delete All Error Rows

Delete Roster

- Coverage must be offered to all employees who work 30 or more hours per week.
- Your group is not eligible to participate in the Small Business Marketplace if you do not have at least one ACTIVE common law employee enrolled (group cannot contain only COBRA or Retiree enrollees).
- If necessary, your most recent NYS-45 filing may be requested.
- You must list ALL eligible employees on your roster and include them in a coverage offer, even if they do not intend to enroll.
- Business owners are eligible for coverage and should be included on the roster.
- If you elect to offer coverage to Retirees, they should also be listed on the roster.
- The address listed for employees should be their residential address.

Show More

Filter Roster

Show All ▼

11 to 12 of 12 Entries < Previous Next >

Edit	First Name	Last Name	Address	Class	Enrollment Status	Participation Code	Actions
● Active	Ashley	Sheppard	15 Sheppard Ln, Albany, NY 12303	Part time staff	Notified	59999269042	<div style="background-color: #c00000; color: white; padding: 2px 5px; border-radius: 4px;">Delete</div>

5. Enter employee information and select a *Joining Date* (Hire Date) from the calendar icon. All fields with an asterisk (*) are required.

Employer Details	<h2>Add Employee Details</h2> <p>Add an individual employee without uploading an entire employee roster by telling us:</p> <p>* Mandatory Field</p> <p>Employee Details</p> <p>First Name * Last Name * Suffix</p> <p><input type="text"/> <input type="text"/> <input type="text" value="Select--"/></p> <p>Phone Number *</p> <p>(<input type="text"/>) <input type="text"/> - <input type="text"/> x Ext. <input type="text"/></p> <p>E-mail Address</p> <p><input type="text"/></p> <p><small>We need your employee's email address to invite them to get insurance through the Small Business. This is the best way for them to enroll.</small></p> <p>Social Security Number *</p> <p><input type="text"/> - <input type="text"/> - <input type="text"/></p> <p><small>The Small Business Marketplace is a secure site and will use your SSN for identity verification purposes only.</small></p> <p>Employee Code *</p> <p><input type="text"/></p> <p><small>This is a unique employer supplied ID number</small></p> <p>Joining Date * </p> <p><input type="text"/></p> <p>Avg. Hrs/Week (required for Active employees only) * Employee Status *</p> <p><input type="text"/> <input type="text" value="Select--"/></p> <p>Mailing Address</p> <p>Address Line 1 * Address Line 2</p> <p><input type="text"/> <input type="text"/></p> <p>City * ZIP Code * County * State *</p> <p><input type="text"/> <input type="text"/> <input type="text" value="--Select--"/> <input type="text" value="--Select--"/></p> <p><input type="button" value="Back"/> <input type="button" value="Add"/></p>
Contact Preferences	
Company Information	
Additional Contact	
Bills and Payments	
Employer Group Settings	
Employee Details >	
Company Review	
Company Confirmation	
<input type="button" value="Return to Agent Portal"/>	

Joining Date *

August 2018

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Employee Status *

Address Line 2

City * ZIP Code * County * State *

- a. Employee's should be added to the Roster as soon as they are hired, not when they become eligible. New Hire logic selected for each class and the Joining Date (Hire Date) will determine the effective date for the employee.
- b. A New Hire Employee can be added to the Employer Roster up to 120 days in the past and 30 days in the future from the current date. However, New Hire Logic will only apply if the New Hire's *Effective Date* is within 30 days of the date they're being added. Otherwise, an error will appear that the employee cannot be added because they are outside of their acceptable time frame. See example:

Example: Today's Date = 7/1/18 Hire Date = 3/26/18

Each New Hire Logic below will determine the effective date based on the above dates.

- New Hire Logic = Date of Hire - Effective Date is 3/26/18.
 - This employee cannot be added to a class as they are outside of the acceptable time frame.
- New Hire Logic = 1st of the Month Following Date of Hire - Effective date is 4/1/18.
 - This Employee cannot be added to a class as they are outside of the acceptable time frame.
- New Hire Logic = 1st of the Month Following 30 Days after Date of Hire - Effective date is 5/1/18.
 - This Employee cannot be added to a class as they are outside of the acceptable time frame.
- New Hire Logic = 1st of the Month following 60 days after Date of Hire - Effective Date is 6/1/18.
 - This Employee can be enrolled because the Effective Date is still within 30 days of today's date. The Employee can be added and enrolled up through 7/1/18 for an effective date of 6/1/18.
- New Hire Logic = 90 Days after Date of Hire - Effective date is 6/23/18.

- o This Employee can be added to the class and enrolled for an effective date of 6/23/18. The employee can be added and enrolled up through 7/22/18 for an effective date of 6/23/18.
 - c. Click the *Add* button once the employee's information is completed. Click the *Back* button to go back.
6. Once the employee is added they will appear on the Roster with a red *Not Yet Offered* under the participation code field. To put this employee into an offer, click the *Create Offer* button at the bottom of the Roster.
Note: Employee's will display in the Employee's Not Classified default class until they are placed into a class.

Filter Roster

Show All ▾

11 to 12 of 12 Entries < Previous Next >

Edit	First Name	Last Name	Address	Class	Enrollment Status	Participation Code	Actions
⊕ Active	Deanna	Potter	45 Front St, Rensselaer, NY 12144	Full time staff	Completed	73574308842	Terminate Manage Invite
⊕ Active	Shelby	Cobra	456 State St, Schenectady, NY 12304	Employees not classified	Not Offered	Not yet offered	Delete

Deleted Employees

1 to 1 of 1 Entries < Previous Next >

Employee Code	Employee Name	SSN	Status	Termination Date	Primary Reason for Termination	Action
IW1091	Irma Wood	**- **-1091	Deleted	07/31/2018	Employment Terminated	Move Back to Roster Remove from Roster

Create Offer ⊕

- Select the Class to which the employee will be added by clicking the radio button next to the class name.

ACCOUNT HOLDER INFORMATION

Account Number:
AC0000049814
Moir McTager
Account Settings

COMPANY INFORMATION Edit

Harry Donuts
EIN: 232345678
92 Saratoga St
Albany NY 12041
Primary Phone:
(518) 545-2132

- Overview
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Select Employment Classes

Plan Year: Apr 1, 2017 to Mar 31, 2018

Select Employment Class
Define Employer Contribution
Define Benefits add Plans to Cart
Shopping Cart & Review Enrl Details
Employee Benefit Offering & Employer Agrmt

- All employment classes, including 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 an existing employment class, click "Employer Offering". You will then be able to Add, Delete or Rename classes. For additional instruction, [click here](#).
- If you opt to not 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 to, you will need to add a COBRA class here and assign your existing 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.

Class Options Employer Offering

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

- Once selected, the class information will expand. Select the employee and click the arrow to move them to the "Employee's in Selected Class" box.

Class Options Employer Offering

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

New Hire Wait Period:
 First of the month following 60 days from Date of Hi

Employees in not classified Class

- Ashton Kutcher(AK0765)
- Shelby Cobra(SC5555)

➔

➜

Employees In Selected class

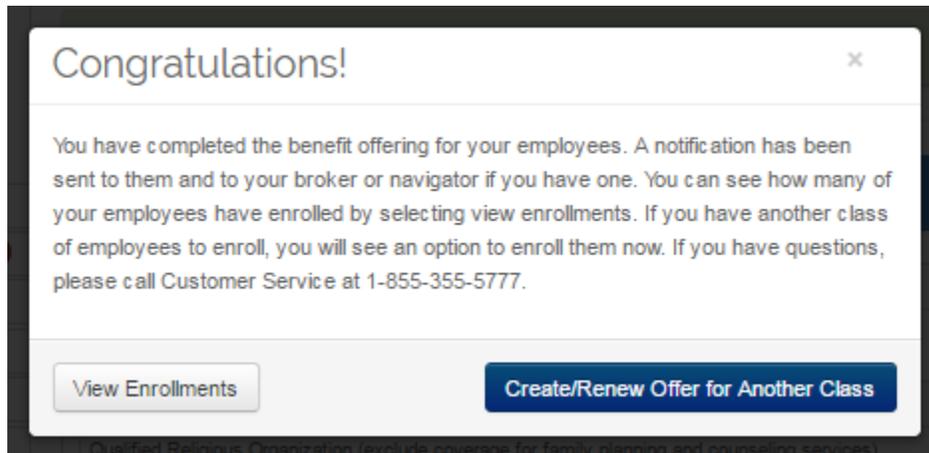
-

Show Effective Date

Back to My Employers
Next >>

8. The employee is now in an offer once the Congratulations! Message appears. This employee will receive a participation code via email to create credentials and enroll in coverage.

Note: There may be a time when the congrats message does not appear and the system requires you to go into the offer and select new plans. This is usually because the plans that were previously selected are within the counties of the employer group and existing employees. You will be redirected to the plan selection screens to include plans within the new employee's county.



- a. Click *View Enrollments* to view the Employer Offering screen.

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Account Settings

COMPANY INFORMATION Edit

Five Guys
EIN: 712345696
726 EIT Street
Albany NY 12203
Primary Phone:
(518) 555-1212

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Employer Offering
Plan Year: Jun 1, 2018 to May 31, 2019 ▼

☰ Instructions for Classes

☰ Instructions for COBRA/Retiree Class

Create Offer

Employees not classified	Delete Class
Management staff	View Offer Delete Class
Full time staff	View Offer Delete Class
Part time staff	View Offer Delete Class

How to Add an Employee Using the Template

On the Company Roster, click *Download Roster Template* to download the Excel spreadsheet roster template to your computer. Add all eligible employees to the spreadsheet (30+ hours per week) along with their personal information, including SSN, DOB, Address and County, Employee Code and Status (Active, Retiree, COBRA), etc. Employee personal Email Address must also be added. It is important that a personal email is entered as they will receive information from the NYSOH, as well as their chosen Carrier. A personal email is also requested in case the employee is ever given an offer of COBRA, as they may no longer have access to their employee email.

If the employer chooses to offer coverage to part time employees, any employee that works, on average, a minimum of 20 hours per week can also be added to the roster. When completed, click *Browse* to locate and upload the roster. The employees that were entered on the roster template will display on the Company Roster at the bottom of the screen.

- *Note: If any of the employee records are in error, a "Fix Errors" flag will display in red on that record. Click the "+" button next to the flag to expand the record and make any necessary corrections.*

- Employer Details
- Contact Preferences
- Company Information
- Additional Contact
- Bills and Payments
- Employer Group Settings
- Employee Details >**
- Company Review
- Company Confirmation
- Return to Agent Portal

Company Roster

- Coverage must be offered to all employees who work 30 or more hours per week.
- Your group is not eligible to participate in the Small Business Marketplace if you do not have at least one ACTIVE common law employee enrolled (group cannot contain only COBRA or Retiree enrollees).
- If necessary, your most recent NYS-45 filing may be requested.
- You must list ALL eligible employees on your roster and include them in a coverage offer, even if they do not intend to enroll.
- Business owners are eligible for coverage and should be included on the roster.
- If you elect to offer coverage to Retirees, they should also 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

Download Roster Template

Choose File

No file chosen

(OR)

2. You can enter your employee information one at a time.

Add Employee/Retiree/COBRA

Add Dependent COBRA Beneficiary

Delete All Error Rows

Delete Roster

Show More

Filter Roster

Show All ▼

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Edit	First Name ▲▼	Last Name ▲▼	Address	Class ▲▼	Enrollment Status ▲▼	Participation Code ▲▼	Actions
No data available in table							

<< Back

Next >>

Roster Template example:

FirstName (String)	LastName (String)	Employee Email(String)	Working Hours per	Phone Number	Number Extension	Hire Date (MM/dd/yyyy)	Employee Code (String)	Social Security Number	Address Line 1 (String)	Address Line 2 (String)	City (String)	State(XX)	Zip Code	County(String)	Employee Status (String)
David	Rocky	david@fakehealth.or	40	518-555-1212	123	09/09/2013	Dav	100-10-1060	22 Elm St		Renssel	NY	12144	Rensselaer	Active
Charles	Rocky	charlie@fakehealth.c	22	518-555-1212		08/08/1978	Cha	100-10-1061	21 Elm St		Renssel	NY	12144	Rensselaer	COBRA Benefeciary
Dylan	McKay	dylan@gmail.com	23	518-555-1113		10/12/2014	Dyl	100-10-1062	34 Main	Apt 1	Albany	NY	12204	Albany	Active
Joe	Dirtee	joe@fakehealth.com	40	518-555-1212	112	10/01/2015	Joe	100-10-1063	45 Washington	Apt 2	Schenec	NY	12306	Schenectady	Retiree

- Please carefully read the **Manage Roster Instructions**, **Manage Enrollment** and **Manage COBRA** sections on this screen by clicking the “show more” link for further information.

Show More

Show Less

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 "Delete" 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 coverage.

Manage Enrollments

1. After you have completed your enrollment offer, a participation code will be sent to all employees on your roster. Your employees will then have the ability to enroll themselves online, or can have customer service assist them. If you want to enroll one or all of your employees directly, you can use the **Enroll button** next to their name on the roster. You will then have to complete the enrollment process for each employee you are assisting.
2. If your employee later wants access to the account you have created for them, use the **Invite button**. This will send an invitation code to the email address on file for this employee.
3. To delete an employee from your insurance offer, you can select the **Delete button** next to the employee's name.
4. In order to enroll an employee who lost qualified health coverage during the plan year, select the **+Active** button to the left of the employee's name, and enter the **loss of coverage** date. This will open a Special Enrollment period and the employee will be allowed to enroll in a plan due to this qualified event and coverage will begin the day after the loss of Health Coverage.

Manage Cobra

- To offer COBRA coverage to a terminated employee, find them underneath the roster and click the **Offer** button. Your previous employee will then have to complete the enrollment process.
- If you want to add a COBRA eligible dependent, select the **Add Dependent COBRA Beneficiary** button, then click the offer button.

Filter Roster

Show All ▼