

How to Delete an Employee from the Roster

1. Deleting/Terminating an employee must be done through the Employer Roster. To start, click the *My Clients* tab, then *Employer* and *Select Associated Agency*. From the list of Employer's associated with the selected Agency, click on the *Manage* link next to the Employer group that needs to terminate the employee from coverage.

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

[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 3 of 3

Company Name	Account ID	No. of Employees	Eligibility Status	Enrollment Status	Renewal Date	Action
Primary Contact Name	Contact Number					
Din Warehouse	AC0000050843	0	PENDING	N/A	N/A	eligibility delete
Caroline Reynolds	518-555-1212					
Five Guys	AC0000034280	7	ELIGIBLE	COMPLETED	06/01/2018	manage delete
Christa Johnson	518-555-1212					
Little Black Dress	AC0000058336	0	ELIGIBLE	N/A	N/A	manage invite delete
Lisa McDowell	516-555-1212					

Export CSV

2. From the Employer's Eligibility Landing screen, click the *Legacy Account* link under SHOP Navigation.

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 screen, click on the *Roster* tab on the left-hand navigation menu.

ACCOUNT HOLDER INFORMATION

Account Number:
AC0000050512
Christa Cookie
Account Settings

COMPANY INFORMATION Edit

Soldier cake shop
EIN: 276867867
3 Forest Dr
Guiderland NY 12508
Primary Phone:
(518) 867-5309

Overview

Messages & Notices **3**

Roster

Employer Offering

Plans

My Documents

Bills and Payments

EBILL

FTE Calculator

Estimate Tax Credit Calculator

Manage Broker/Navigator

Address History

Account Overview Plan Year: May 1, 2017 to Apr 30, 2018

- 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 - 05/01/2017

Employer Group Settings Edit Settings

Open enrollment start date 04/07/2017 Open enrollment end date 04/15/2017

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 **3**

You have 3 unread notice(s) in your Messages & Notices Inbox.

Employees Enrolled View Details

Active

100.0%

Not Enrolled

Enrolled Not Enrolled Not Yet Offered

COBRA

Enrolled Not Enrolled Not Yet Offered

Marketplace Participation Status

Current Participant in the Small Business Marketplace Terminate Small Business Marketplace Participation

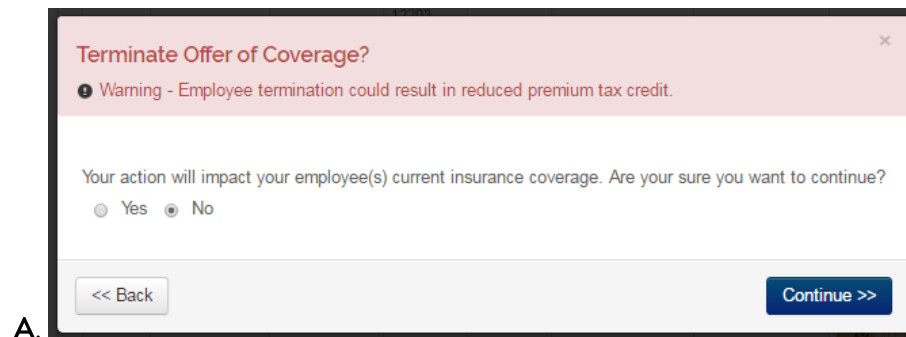
4. On the Roster tab, each employee will have either a “Delete” button or a “Terminate” button. The **Delete** button appears for employee’s who are not enrolled, whether they have an offer of coverage or not. The **Terminate** button will appear if the employee is currently enrolled. Click *Delete/Terminate*.

Active	Planseventy	Three	3 albany, Queens, NY 11412	Non-Exempt Staff	Completed	61174052502	<div>Terminate</div> <div>Modify Employee Offering</div> <div>Manage</div> <div>Invite</div>
Active	Planseventy	Four	4 albany, Albany, NY 12203	Executive staff	In Progress	32122932426	<div>Delete</div> <div>Modify Employee Offering</div> <div>Manage</div> <div>Invite</div>

5. A Warning screen will appear asking if you want to Terminate the Offer of Coverage.

Figure A: Select *Yes* and click *Continue*.

Figure B: Additional information is then requested.



Terminate Offer of Coverage?

Warning - Employee termination could result in reduced premium tax credit.

Your action will impact your employee(s) current insurance coverage. Are you sure you want to continue?

☒ Yes ☐ No

Reason for terminating insurance?

Select One

Coverage End Date (Click on the Calendar icon to terminate the employee on a different Date)

04/30/2017

<< Back Continue >>

B.

6. Select reason for terminating insurance from the drop-down menu.
 - COBRA triggering events include: Employee(s) Receive Medicare, Change in Employee Hours, Employment Terminated, Death and Retirement.

Terminate Offer of Coverage?

Warning - Employee termination could result in reduced premium tax credit.

Your action will impact your employee(s) current insurance coverage. Are you sure you want to continue?

☒ Yes ☐ No

Reason for terminating insurance?

Select One

- Select One
- Employee(s) have Insurance from another job
- Employee(s) have insurance through spouse/partner
- Employee(s) receive Medicare
- Employee(s) receive Medicaid
- Employee(s) receive TRICARE
- Employee(s) have VA coverage
- Change in Employee Hours
- Employment Terminated
- I am changing my coverage offer
- Death
- Retirement
- Employee(s) has private insurance

Coverage End Date (Click on the Calendar icon to terminate the employee on a different Date)

Continue >>

7. Select the Coverage End Date. The field will appear to be greyed out. Use the calendar icon to choose a date. Use the arrow keys before and after the month at the top of the calendar to go backward or forward.

*Note: the system will only allow a termination date to be chosen on the **last day of the previous month**, the **current month** and the **last day of the following month**.*

The screenshot shows a web-based dialog box titled "Terminate Offer of Coverage?". At the top, there is a warning icon and text: "Warning - Employee termination could result in reduced premium tax credit." Below this, a question asks: "Your action will impact your employee(s) current insurance coverage. Are you sure you want to continue?" with radio buttons for "Yes" (selected) and "No". A dropdown menu for "Reason for terminating insurance?" is set to "Employment Terminated". The "Coverage End Date" field is greyed out, but a calendar icon is visible. The calendar is open, showing "March 2017". The date "31" is highlighted in the bottom right corner of the calendar grid. A "Continue >>" button is located at the bottom right of the dialog box.

8. When finished selecting a date of removal and a reason for removing the employee from the roster, click *Continue*.

This screenshot shows the same "Terminate Offer of Coverage?" dialog box, but the calendar is no longer open. The "Coverage End Date" field now displays "03/31/2017" and is no longer greyed out. A "Calendar" icon is still present next to the date field. At the bottom of the dialog box, there are two buttons: "<< Back" on the left and "Continue >>" on the right.

9. You will be directed back to the Roster tab. If the employee was deleted from the roster for a reason which would make them no longer part of the business (i.e. termination, death, etc.) then they will appear below the Roster under the Deleted Employee's section. *The Plans tab will now display this employee's status as *pending for termination*.

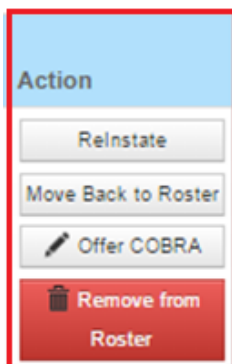
Any deleted/terminated employee that was removed with a reason that allows them to remain as an employee of the company (i.e. has insurance through spouse, changing coverage offer, etc.) will remain active on the roster.

Deleted Employees 1 to 1 of 1 Entries < Previous Next >

Employee Code	Employee Name	SSN	Status	Termination Date	Primary Reason for Termination	Action
33333	Planseventy Three	***-**-3490	Deleted	03/31/2017	Employment Terminated	<div>Reinstate</div> <div>Move Back to Roster</div> <div>Offer COBRA</div> <div>Remove from Roster</div>

Create Offer

10. Options for a deleted employee include the following:



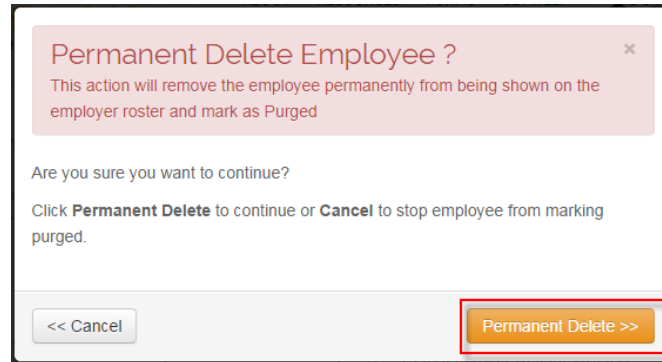
Reinstate – Will reinstate the employee back to their original coverage date with no gap in coverage and reinstates deductibles paid toward plan (if applicable). This button is only available for 30 days past the termination date.

Move Back to Roster – Allows Employer/Broker to move the employee back to the Roster with a brand-new coverage offer. A new Hire Date will be needed and the New Hire Logic of the class the employee is put into will determine the effective date.

Offer COBRA – Send an offer of COBRA to the terminated Employee. The employee will still need to enroll in their COBRA coverage. This button is only available for 60 days after the termination date.

Remove from Roster – Permanently deletes the employee from the deleted employee section. ****See explanation below for further information on this function****

11. If *Remove from Roster* is selected, the following warning message will appear:



ONLY perform this function if there is a duplicate employee on the Roster, or if there was a mistake made upon adding the employee that prohibits them from enrolling. Once this action is taken, the employee will completely disappear from the employer account and you will not be able to reinstate their coverage or offer them COBRA. Permanently deleting will allow you to re-add that employee back to the Roster as a new employee. Do NOT permanently delete an employee solely because they no longer work for the company. For more information on COBRA, see the "[*How to Offer COBRA to Eligible Dependents*](#)" and "[*How to Offer COBRA to Terminated Employees*](#)".

Note: If the wrong employee was permanently deleted and needs to be added back to the Roster you must call the Customer Service Center at 1-855-355-5777.