

# How to Renew a Small Group Client

1. From the **Broker Dashboard**, select a client to work with and click *Manage*.

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My Clients Messages & Notices Documents

### Account Holder Info

**Rankin Heather**  
Account Settings

Account No: AC000029194

Certification No: SI60849

Expiration Date: 2016-08-27

## Overview

Here you can select a current client's account to manage. Please select an agency from the drop down menu below. To continue managing your account select Show Employer List. If an employer has authorized you to manage their account but is not on your client list, you can add them by clicking Add Employer.

## My Clients

Employer Employee Individual

Select Employers of an Associated Agency or Select All.

Select Associated Agency\*

Direct Clients Show Employers List OR Add Employer Enter Details

## Search Employer

Filter Options

Employer (Company Name) Primary Contact

Reset All

\*Please click on 'eligibility' for the employer you want to enroll.

1 to 2 of 2 < Previous Next >

Company	Client Name	AccountID	Phone Number	Eligibility Status	Enrollment Status	Employees	Renewal Date	Action
Farmers market	Sally Smith	AC0000029362	5181234567	eligible	es6797 : completed	5	es6797 : 11/01/2015	Manage Invite Delete
Greentree vegetables	Dan Frank	AC0000029572	5187894567	eligible	es6956 : in_progress	2	es6956 : 01/01/2016	Manage Invite Delete

2. If a group is eligible for renewal (generally within 90 days prior to plan end date), you will be directed to choose whether or not to manage the group's Current Coverage or Prospective Coverage. To work on the employer's renewal offering, select Prospective Coverage and click *Continue*.

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## Employer Applications

The following is a listing of all of your accounts. Please choose the employer account you want to work with and select continue button.

**Prospective Coverage**

Employer Name	Effective Start Date	Effective End Date
Greentree vegetables	01/01/2015	12/31/2015

**Current Coverage**

Employer Name	Effective Start Date	Effective End Date
Greentree vegetables	01/01/2014	12/31/2014

[<< Back](#) [Continue >>](#)

- On the group's Account Overview page, you can choose to Create/Renew Enrollments, extend the open enrollment end date (if applicable) or opt not to renew the policy. For renewals, click **Create/Renew Enrollments** (see following page for other options).

Overview
Messages & Notices
Roster
My Enrollment
Plans
My Documents
Appeals
Cobra

**ACCOUNT HOLDER INFORMATION**

Account Number:  
AC0000030063  
**Molly, MacMahon**  
Account Settings

**COMPANY INFORMATION**

**Time clocks**  
3 forest Dr  
Albany NY 12084  
**Primary Phone:**  
(518) 222-2222

Edit Company Information

Edit Additional Contact Information

Bills and Payments

EBILL

ShopTool Test Page

Estimate Tax Credit Calculator

My Applications

## Account Overview

- To create Enrollment offerings for the next plan year or to renew your existing enrollment offering(s), select **Create/Renew Enrollments**, under the Roster Header below
- Check the **Messages & Notices** tab for updates and important communications from the Small Business Marketplace
- Adding a new hire, terminating an employee or managing an employee? Click **Manage Roster**
- If you are returning to complete an enrollment, click **My Enrollment** tab to proceed
- To view plan enrollment details, click the **Plans** tab
- Click the **COBRA** tab to enroll employees who have been terminated from your Marketplace group insurance into COBRA coverage
- To change the plan year you are working with, please click the "My Applications" tab in the left column

**Employer Group Settings**
Edit Settings

**Group Effective Enrollment date**

Effective start date of coverage	01/01/2015	Effective end date of coverage	12/31/2015
Open enrollment start date	09/25/2014	Open enrollment end date	11/30/2014

➔ You are eligible to extend the enrollment end date until 12/15/2014
 Extend Enrollment End Date

**Health coverage options and riders**

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

**Messages & Notices** 9

⚠ You have 9 unread notice(s) in your Messages & Notices Inbox.

**Marketplace Eligibility Status**

Business eligible for Small Business Marketplace

**Roster Status**
Manage Roster

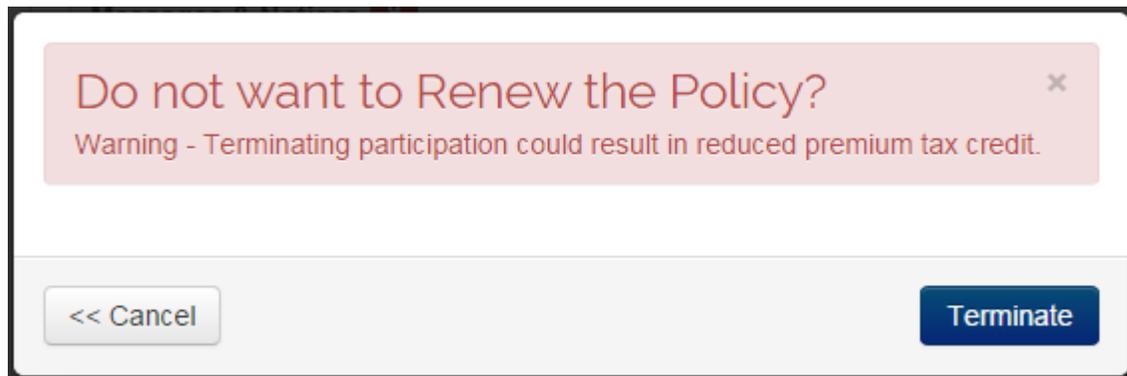
❗ There are 0 errors on your company roster. [Correct Roster Errors](#)

❗ 0 New employees have been added to the roster
 Create/Renew Enrollment

**Marketplace Participation Status**

Current Participant in the Small Business Marketplace
 
➔
Do not want to Renew the Policy

4. If you decide not to renew the policy, the following warning message will display; you can choose to terminate coverage and cancel this employer's participation in the Small Business Marketplace .



5. If you click on Create/Renew Enrollments, you will land on the **Employer Group Settings** page, where the effective date will automatically display for groups renewing coverage. Click *Next*.
- Employers can choose to add or delete health coverage options and riders: one for coverage of employees' domestic partners and one for exemption from family planning and contraceptive services.
  - Selection of the Qualified Religious Organization exemption will exclude coverage for family planning services, including contraceptive coverage, from employer sponsored health insurance plan(s) and the employer will be asked to attest to certain criteria in order to proceed with this selection.
  - These options, once selected, will apply to all classes created by the employer and cannot be changed after the open enrollment period has ended. These selections can be changed during the group's next Open Enrollment.

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## Employer Group Settings

[My Dashboard](#)

### New Employers to the SBM

Please choose the Effective Date that you would like your employees' coverage to begin. We will calculate the open enrollment period based on the plan year effective date you select. Coverage must begin on the 1st of the month. The open enrollment period will begin the day you complete your enrollment offering(s) to your employees.

### Employers Renewing Coverage in the SBM

The effective date below has been pre-populated to ensure that there will be no gap in your employees' coverage. To continue, select "NEXT".

#### Group Effective Enrollment Date

\* Mandatory Field

Effective Date of Coverage\*

01/01/2015

Open Enrollment Starts\*      Open Enrollment Ends\*

09/25/2014      12/15/2014

### Health coverage options and riders

Cover domestic partners

Qualified Religious Organization (exclude coverage for family planning and counseling services) ⓘ

Note\*: The rider option to extend dependent child coverage to age 29 will be available at the employee class level

[Next >>](#)

6. On the **Select Employee Classes** page, you will be able to manage the group's classes before creating an enrollment offering. You can view **additional instructions** if necessary by clicking on the blue hyperlink, "click here". It is important to read all the help text before proceeding. Start by clicking *Manage Classes*.

Logged in as nycbroker   My Dashboard

## Select Employment Classes My Dashboard

- 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.

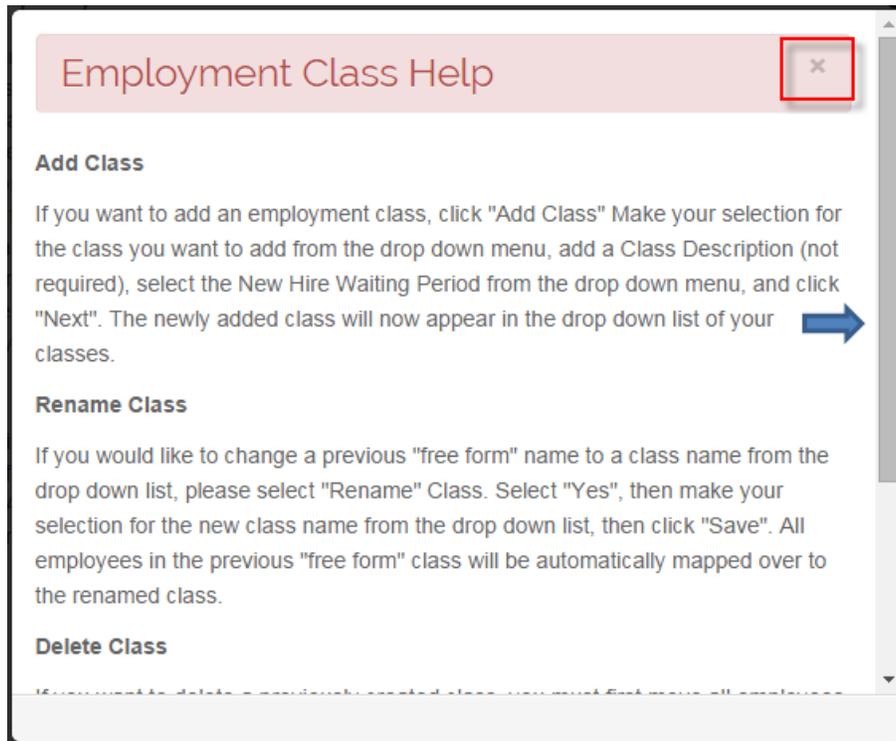
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Class Options Manage Classes

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

Back to My EmployersNext >>

\*Screen capture for “additional instructions”. You can scroll down to read all instructions and close the window when you are finished.



The screenshot shows a help window titled "Employment Class Help" with a close button (X) in the top right corner. The window contains three sections of instructions:

- Add Class**  
If you want to add an employment class, click "Add Class" Make your selection for the class you want to add from the drop down menu, add a Class Description (not required), select the New Hire Waiting Period from the drop down menu, and click "Next". The newly added class will now appear in the drop down list of your classes. 
- Rename Class**  
If you would like to change a previous "free form" name to a class name from the drop down list, please select "Rename" Class. Select "Yes", then make your selection for the new class name from the drop down list, then click "Save". All employees in the previous "free form" class will be automatically mapped over to the renamed class.
- Delete Class**  
If you want to delete a previously created class, you must first remove all employees

7. From the **Manage Employee Classes** page, you can add, delete or rename (previous “free form”) classes and re-assign employees. Review the following screen captures and the adjoining set of instructions for each of these actions.

### Add Class

If you want to add an employment class, click "Add Class" Make your selection for the class you want to add from the drop down menu, add a Class Description (not required), select the New Hire Waiting Period from the drop down menu, and click "Next". The newly added class will now appear in the drop down list of your classes.

## 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.

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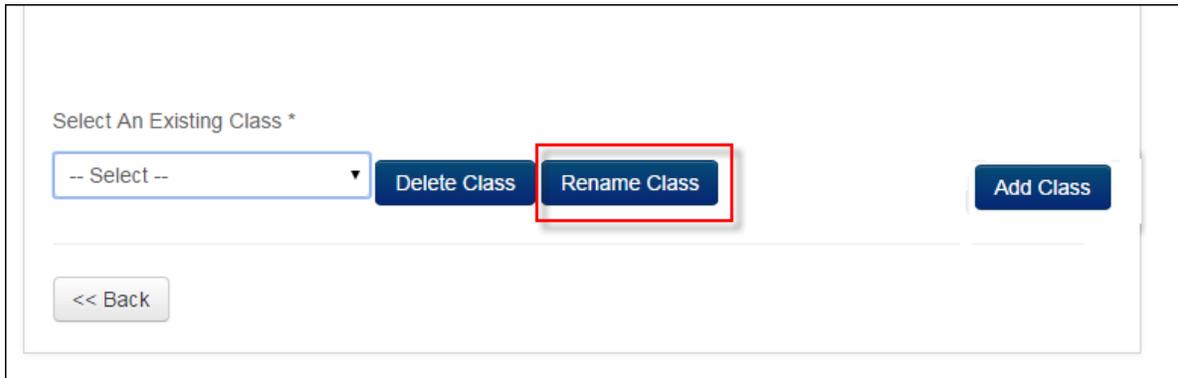
Select An Existing Class \*

-- Select --

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## Rename Class

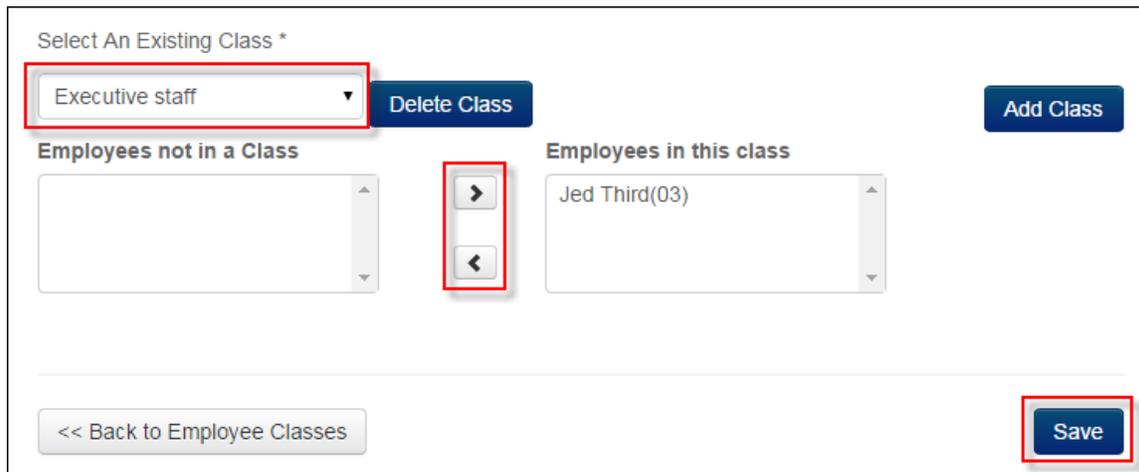
If you would like to change a previous "free form" name to a class name from the drop down list, please select "Rename" Class. Select "Yes", then make your selection for the new class name from the drop down list, then click "Save". All employees in the previous "free form" class will be automatically mapped over to the renamed class.



The screenshot shows a web interface for managing classes. At the top, there is a label "Select An Existing Class \*". Below it is a dropdown menu with "-- Select --" and a downward arrow. To the right of the dropdown are two buttons: "Delete Class" and "Rename Class". The "Rename Class" button is highlighted with a red rectangular box. Further to the right is a button labeled "Add Class". At the bottom left, there is a button labeled "<< Back".

## Delete Class

If you want to delete a previously created class, you must first move all employees from that class to Employees Not Classified. Once the class is "empty", you may delete the class from your list. You may now move those employees into another class.



The screenshot shows a web interface for deleting a class. At the top, there is a label "Select An Existing Class \*". Below it is a dropdown menu with "Executive staff" and a downward arrow. The dropdown menu is highlighted with a red rectangular box. To the right of the dropdown are two buttons: "Delete Class" and "Add Class". Below the dropdown, there are two columns: "Employees not in a Class" and "Employees in this class". The "Employees not in a Class" column is empty. The "Employees in this class" column contains the text "Jed Third(03)". Between the two columns are two arrows: a right-pointing arrow and a left-pointing arrow. The right-pointing arrow is highlighted with a red rectangular box. At the bottom left, there is a button labeled "<< Back to Employee Classes". At the bottom right, there is a button labeled "Save", which is highlighted with a red rectangular box.

## Reassign Employee

Reassign an employee to a different class (using the assignment arrows) by first moving employee into Employees Not Classified and then moving them into the desired class. THIS WILL CHANGE THE ORIGINAL EMPLOYEE ENROLLMENT OFFERING TO THAT OF THE NEW CLASS.

## Done Managing classes

When you are finished managing your classes, click "Back to Track Enrollment".

Select An Existing Class \*

-- Select --

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8. Back on the **Select Employment Classes** page, you will see your resulting classes and waiting period criteria. Please review classes and make any changes you need to by returning to the Manage Classes function. Make sure you have made all changes necessary before you move to the next step as you will NOT be able to manage classes after you've created the renewal enrollment offering(s). When you are finished managing your classes, click the radio button next to the class for which you want to create the first enrollment offering and click *Next*.

**Please note:** the system will automatically take you to the next class to create an enrollment offering when you have finished the current one.

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**

9. The next page is the Define Employer Contribution page. Please see, “How to Create an Enrollment” if you need assistance to proceed through the enrollment offering. Remember that the system will automatically take you to the next classes to create an enrollment and that you have to create an enrollment for ALL classes at renewal whether or not the classes contain any employees at that point in time.

## Define Employer Contribution<sup>3</sup>

[My Dashboard](#)

Please tell us the amount of your employer contribution towards the premium for this employee class.

- First, choose one or more coverage tier.
- Next, define the contribution for each tier by percentage or dollar amount. If you do not define the contribution for a tier, the employee will pay the whole premium.
- Reminder: If you are enrolling COBRA participants, set employer contribution to zero.
- You must select every tier of coverage that you want to offer your employees this coverage year.

Your employer contribution and the number of employees you have will affect whether you qualify for tax credits. To learn more, go to <http://www.irs.gov>.

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**Class :** Hourly staff

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Select Coverage Tiers \*

Employee

Employee + Spouse

Employee + Child/ren

Employee + Family

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Health Options

Extend Coverage for dependent children from age 26 through age 29 (cost of coverage may increase)

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Define Employer Contribution

Employee

% or \$  Monthly (whichever is lower)

Employee + Spouse

% or \$  Monthly (whichever is lower)

Employee + Child/ren

% or \$  Monthly (whichever is lower)

Employee + Family

% or \$  Monthly (whichever is lower)

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Dental Coverage

Select YES if you want to offer your employees the ability to enroll in dental coverage, including pediatric only dental.

Do you want to offer dental coverage?

Yes  No

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