

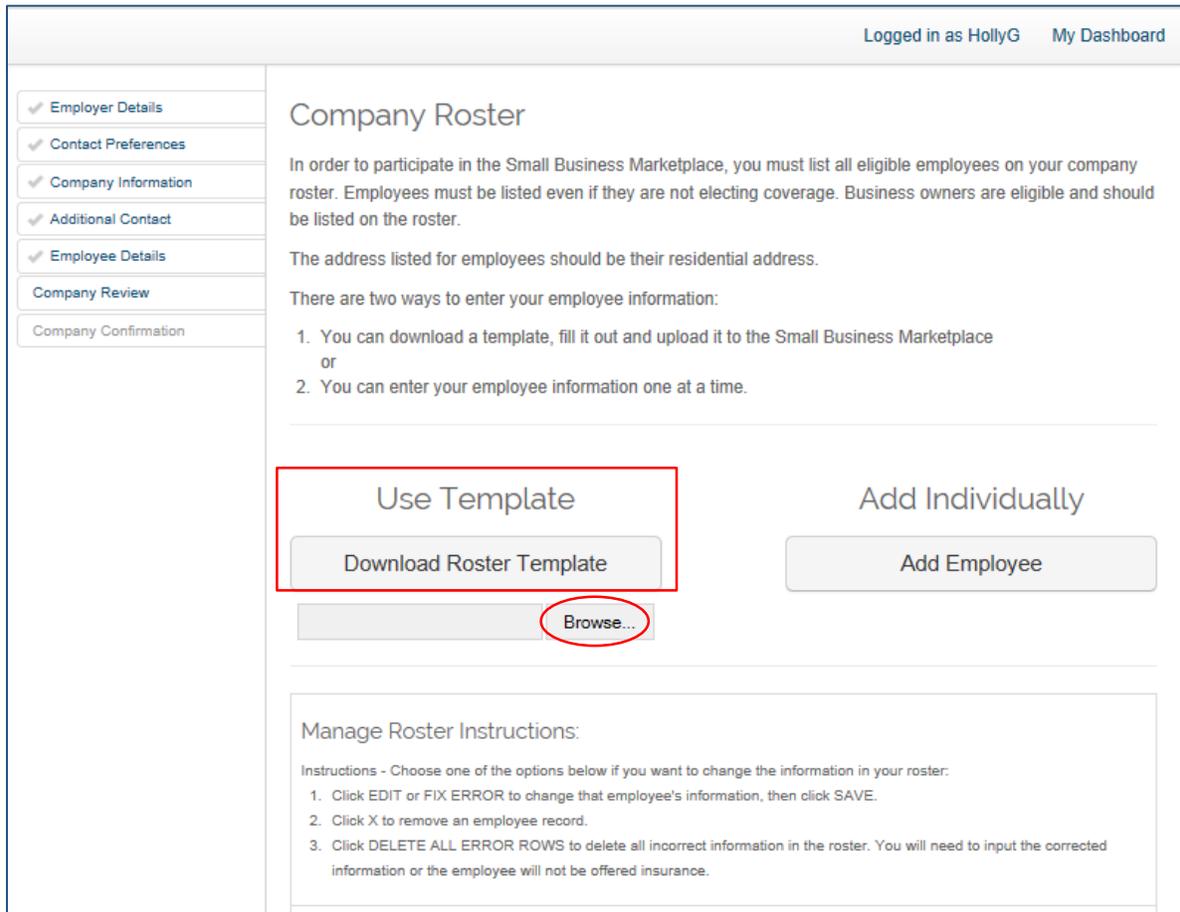
# How to Add an Employee

## How to Add an Employee Using the Template

1. On the **Company Roster** page, click *Download Roster Template* to download the Excel spreadsheet roster template to your computer. Add all employees to the spreadsheet. When completed, click *Browse* to locate and upload the roster. The employees that you entered on the roster will display in the roster table at the bottom of the page.

Please carefully read the **Manage Roster Instructions** and **Manage Enrollment Instructions** on this page for further information.

*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. Make any necessary corrections.*



- All employees that were added to the roster will appear under the light blue bar. Please review the list carefully to make sure no employees were omitted. *Click on Fix Errors and update highlighted information if necessary.* Click **NEXT** to continue.

### 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 provided when you setup their account.

3. To delete an employee from your insurance offer, you can select the **Delete button** next to the employees name.

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**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
✖ Fix Errors	HC01	Abigail Stark	colleen.williams@hea...	200 Broadway, Albany, NY 12203		Delete
✚ Edit	HC02	Evelyn Snow	colleen.williams@hea...	200 Main Street, Albany, NY 12203		Delete
✚ Edit	HC03	Maeve Tully	colleen.williams@hea...	200 Winter Street, Albany, NY 12203		Delete
✚ Edit	HC04	Megan Martell	colleen.williams@hea...	200 Dorne Street, Albany, NY 12203		Delete

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Next >>

## How to Add an Employee Individually

1. On the **Company Roster** page, click *Add Employee*.

Logged in as HollyG My Dashboard

✓ Employer Details  
✓ Contact Preferences  
✓ Company Information  
✓ Additional Contact  
✓ Employee Details  
Company Review  
Company Confirmation

### 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

Download Roster Template

Browse...

Add Individually

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. On the **Add Employee** page, enter the details about the employee and click *Add*.

- During Open Enrollment, you can only add employees who have a date of hire that occurs before the end of the Open Enrollment Period; after Open Enrollment and throughout the employer's plan year, you can add both new hire employees and newly eligible employees here.

Logged in as nycbroker My Dashboard

✓ Employer Details  
✓ Contact Preferences  
✓ Company Information  
✓ Additional Contact  
✓ Employee Details  
Company Review  
Company Confirmation

### Add Employee

Add an individual employee without uploading an entire employee roster by telling us:

\* Mandatory Field

#### Employee Details

First Name \* Last Name \* Suffix

Phone Number \*  
(  )  -  x Ext.

E-mail Address

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.

Social Security Number \*  
 -  -

The Small Business Marketplace is a secure site and will use your SSN for identity verification purposes only.

Employee Code \*

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 \*

- Verify that all eligible employees display on the roster. To continue, please see the “How to Create an Enrollment Offering” user guide.

**Please Note:** ALL eligible employees in the client group should be entered to the roster regardless of whether or not they need insurance coverage at the time of this enrollment (an employee will have the option of declining the coverage offer). Entering all employees will ensure an accurate determination and allow eligible employees to join the plan at a later date.

Filter Roster

Show All

1 to 5 of 5 Entries < Previous Next >

Status	Employee Code	Employee Name	E-Mail Address	Address	Participation Code	Actions
Edit	HC02	Evelyn Snow	colleen.williams@hea...	200 Main Street, Albany, NY 12203		Delete
Edit	HC03	Maeve Tully	colleen.williams@hea...	200 Winter Street, Albany, NY 12203		Delete
Edit	HC04	Megan Martell	colleen.williams@hea...	200 Dorne Street, Albany, NY 12203		Delete
Edit	HC01	Abigail Stark	colleen.williams@hea...	200 Broadway, Albany, NY 12203		Delete
Edit	HC05	Eleanor Tyrell	colleen.williams@hea...	100 North Street, Albany, NY 12203		Delete

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