

HEALTHPASS ONLINE PORTAL
HOP RENEWAL
WALKTHROUGH



TABLE OF CONTENTS

Introduction	1
Types of Documents	2
Renewal Timeline	3
Getting Started	4
Uploading Renewal Documents	5
Broker Information	6
Employee Census	7
Group Elections	8
Group Elections - Medical Plans	9
Group Elections - Ancillary Bundles	10
Defined Contribution	11
Bank Information	12
Start Enrollment	13
Ending Enrollment Via Group Manager	14
Enrollment Complete	15



INTRODUCTION

Welcome to the HealthPass Online Portal Renewal Walkthrough! We understand that renewing your group's health insurance can be a daunting process as you struggle to keep track of the various options, procedures and requirements.

But it doesn't have to be; in fact, the whole process from beginning to end can take as little as five minutes! Our goal is to help your renewal process be as smooth and stress-free as possible. By familiarizing yourself with the information contained in this walkthrough, you will know just what to expect as your group approaches their renewal date, and in turn know just what to do when your renewal window opens.

And as always, if you ever have any questions, please reach out to our Renewals Department by either emailing renewals@healthpassny.com or dialing 888-313-7277 and asking to speak to a Renewals Specialist. We're here to help!

TYPES OF DOCUMENTS

One of the first orders of business as you approach your renewal date is to figure out which document(s) you'll need to upload to your online application. There are only two options:

1. Renewing Group Attestation Form*-mailed to groups as part of their renewal package. This form attests that you're not making changes to any of the following group criteria:

- New hire waiting period
- Hours worked per week to be eligible for coverage
- Ancillary product offering(s)
- COBRA admin participation

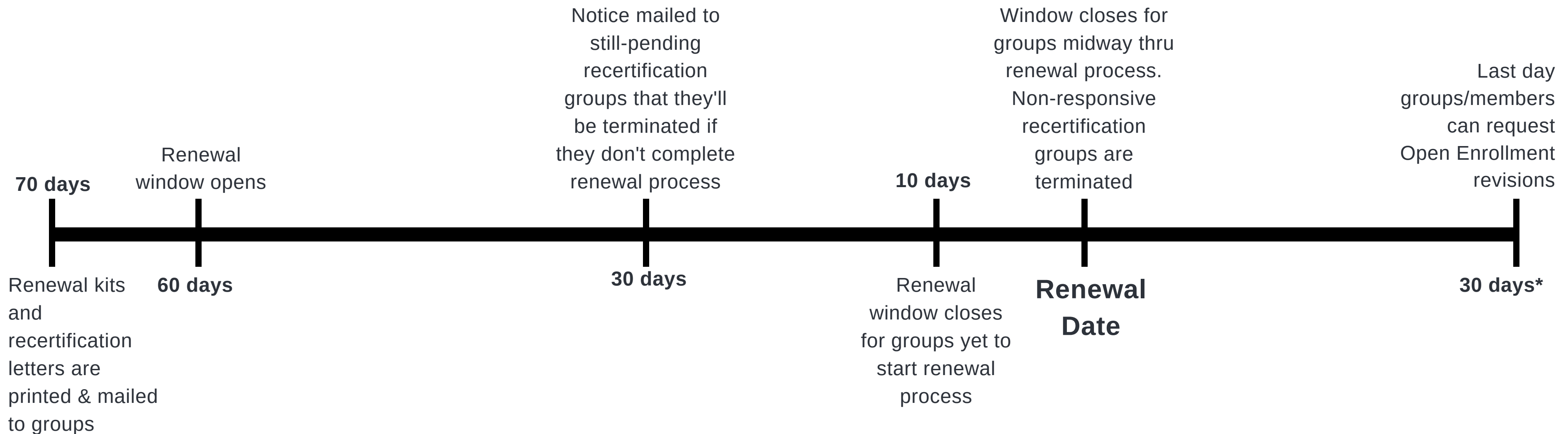
2. Notated Tax Documents-should be uploaded instead of the Renewing Group Attestation Form if your group is chosen for recertification audit or changing any of the above group criteria. For more information on using the proper notations/tax documents, refer to the Eligibility Guidelines*.

Note that the renewal window will close on the 20th of the month prior to renewal for all groups who haven't yet started the renewal process. If these groups have yet to recertify or wish to make any changes, they should send the appropriate document above in addition to their signed renewal application to renewals@healthpassny.com.

*available at <http://www.healthpass.com/formsanddocuments>

RENEWAL TIMELINE

Below is a timeline of the standard renewal process. Note that all timeframes are approximate and subject to change.



*Post-Renewal

GETTING STARTED

To start your renewal, log onto the HOP and click **Continue Your Renewal Application!**

The screenshot shows a web application interface. At the top is a dark blue navigation bar with a home icon, and menu items: Admin, Exchange Admin, Reports, Library, and Bill. Below the navigation bar is a light blue notification bar with an information icon and the text "Production Server Maintenance on 3/2". The main content area has a white background with a dark blue vertical bar on the left. It displays a welcome message "Welcome, Don", a user profile section "Signed in as Manager at Sterling Cooper", and a notification "You have alerts Continue Your Renewal Application!". A hand icon points to the "Continue Your Renewal Application!" link. Below this is another notification "Welcome Brokers and Administrators!". At the bottom, there is a paragraph about viewing documents and a URL: <http://www.healthpassny.com/formsanddocument>.

UPLOADING RENEWAL DOCUMENTS

- 1 Review and update your company information as needed.
- 2 Click **Choose File** next to **NOTATED NYS 45 / Tax Documents or Renewal Attestation Form** and upload the appropriate document(s).

Specify which type of document you uploaded by selecting the **Document Upload Type** radio button and then press **Save and Continue**.

1 Your Company

Answer a few questions for us so that we can set up your company.

In the first section you will tell us more about your company and upload your NYS45 Quarterly Wage & Tax Statement and responses will be logged and will display the next time you log in.

Company Information

Please answer the questions below to complete your application. Fields marked with an * are required. Applicable answers will be saved for your convenience.

Your Company

* Full Name of Company	<input type="text" value="Sterling Cooper Advertising Agency"/>
* Doing Business As (DBA) Name	<input type="text" value="Sterling Cooper"/>
* Federal Tax ID Number ⓘ	<input type="text" value="12-1234568"/>
* Date Company Founded On	<input type="text" value="06/01/1923"/>
* Organizational Type	<input corp"="" type="text" value="C"/>
* Employer Industry	<input type="text" value="Other"/>

2

* NOTATED NYS 45 / Tax Documents or Renewal Attestation Form ⓘ	<input type="text" value="Renewal DOC.docx"/> [delete]
Additional Documentation 1 ⓘ	<input type="button" value="Choose File"/> No file chosen
Additional Documentation 2 ⓘ	<input type="button" value="Choose File"/> No file chosen
Additional Documentation 3 ⓘ	<input type="button" value="Choose File"/> No file chosen
* Document Upload Type	<input checked="" type="radio"/> NYS45 / Tax Documents <input type="radio"/> Renewal Attestation Form

BROKER INFORMATION

Review your Broker and General Agent information and then press **Save and Continue**.

Broker Information

Please verify the broker(s) and GA below. If you want to make any changes enter the broker ID of your preferred broker and GA. Broker commission splits must total 100%. If you are unsure of your broker or GA ID, please reach out to your broker directly or contact HealthPass NY Client Services at 888-313-7277.

Selected Broker(s)

Type	Name	Agency	Commission	Remove
Broker <input type="button" value="v"/>	Lee Garner	Lucky Strike	<input type="text" value="100 %"/>	<input type="button" value="x"/>


Commission Total (must total 100%) **100%**

EMPLOYEE CENSUS

Review the employee census and add members as necessary by selecting **Add a New User** (though you can also enter members later during Open Enrollment).

Press **Save and Continue** when finished, and then click **OK** in the message box that subsequently appears.

Your Employees
Take a look at your current employees. Is anyone missing? If so, add them now so they are automatic

 **+ Add a New User**

Last Name	First Name	Middle Initial	SSN	Employment Sta		
Draper	Don		123-12-1234	Active		
Sterling	Roger		123-12-1235	Active		
Cooper	Bertram		123-12-1236	Active	0	BCoo1236
Olson	Margaret		123-12-1237	Active	0	MOls1237
Campbell	Peter		123-12-4321	Active	0	PCam4321
Holloway	Joan		123-45-6789	Active	0	JHol6789

Please wait, your renewal is being pro...

We are currently creating your site based on your application responses. This may take up to 5 minutes to process. Do not close your browser. However, you may close this message window.

Once your site is complete you will be brought to the next steps. You can then select the plans you want to offer, define your contribution strategy, and start

OK **Cancel**

✔ Save and Continue

GROUP ELECTIONS

Your group will now be in Group Elections, where you'll be able to choose plan offerings. Two things to note now that you've reached this stage:

—You will no longer be able to manually edit your group's application online. Any changes should be recorded on your paper application and forwarded to *renewals@healthpassny.com* for processing.

—If you're unable to finish processing for whatever reason, you can reenter Group Elections in the same manner that you accessed the Renewal Application, by logging into the HOP and clicking **Go to Group Elections**

The screenshot shows a web application interface with a dark blue navigation bar at the top containing icons for Home, Admin (with a dropdown arrow), Exchange Admin (with a dropdown arrow), Reports (with a dropdown arrow), and a partially visible 'Li' tab. Below the navigation bar is a light blue banner with an information icon and the text 'Production Server Maintenance on 3/2'. The main content area has a white background with a dark blue vertical bar on the left. It displays a 'Welcome, Don' message, a user profile section showing 'Signed in as Manager (with a dropdown arrow) at Sterling Cooper', a notification bell icon with the text 'You have alerts' and a link 'Go to Group Elections' (highlighted by a red hand cursor), and a document icon with the text 'Welcome Brokers and Administrators!'.

GROUP ELECTIONS - MEDICAL PLANS

The Group Elections page opens with all available HealthPass medical plans preselected (a green checkmark indicates that a plan ***is*** being offered by your group).

To make a plan unavailable, click the accompanying green checkmark. It will be replaced by a faint blue outline. In addition to unchecking plans individually, you can click the **Deselect all** button if you'd like to remove an entire carrier's portfolio.

Oxford Oxford

To enroll in Liberty NG plans (non-gated), employees can live anywhere in

To enroll in Liberty Advantage & Liberty G plans (gated), employees must Choice Plus when they travel or have children attending college outside of

To enroll in Metro plans, employees must live or work in NY or NJ.

Select all Deselect all [Show more detail](#)

<input type="checkbox"/>	Oxford Liberty Bronze EPO HSA 3300 NG Oxford Rx EPO Bronze HSA
<input checked="" type="checkbox"/>	Oxford Liberty Gold EPO 30/60 G Oxford Rx EPO Gold

Your Plan Options

Select Medical Plans ^

Choose the medical plans you would like to offer to your employees for the upcoming policy year. You may choose to offer all plans or a select number of plans, though it is recommended to allow employees access to the full portfolio. 20% of the total eligible employees must enroll with a HealthPass medical plan. 75% of eligible employees must participate in either HealthPass or another health insurance plan. At every policy renewal you will be required to reestablish the plans to offer or all plans will be made available.

[View all costs >](#)

Healthfirst Healthfirst

To enroll, employees must live or work in the five boroughs and Nassau or Suffolk.

Select all Deselect all [Show more detail](#)

<input checked="" type="checkbox"/>	Healthfirst Bronze 6650 Pro EPO HSA Healthfirst Rx Maternity EPO Bronze HSA	view plan details >	<input type="checkbox"/> Compare Plan
<input checked="" type="checkbox"/>	Healthfirst Bronze Pro EPO HSA Healthfirst Rx Maternity EPO Bronze HSA	view plan details >	<input type="checkbox"/> Compare Plan
<input checked="" type="checkbox"/>	Healthfirst Gold 25/50/0 Pro EPO Healthfirst Rx Maternity EPO Gold	view plan details >	<input type="checkbox"/> Compare Plan
<input checked="" type="checkbox"/>	Healthfirst Gold Pro EPO Healthfirst Rx Maternity EPO Gold	view plan details >	<input type="checkbox"/> Compare Plan
<input checked="" type="checkbox"/>	Healthfirst Platinum Pro EPO Healthfirst Rx EPO Platinum	view plan details >	<input type="checkbox"/> Compare Plan

GROUP ELECTIONS - ANCILLARY BUNDLES

You can also choose to offer ancillary plans, which can be viewed by clicking the appropriate tab under the medical offerings.

- Select 1 Dental Package
- Select 1 Vision Package
- Select Life/ADD/LTD Plans
- Select Accident Plan
- Select 1 ID Theft Package

To choose an ancillary offering, either click the faint checkmark to the left of the bundle or click **Select Bundle** directly above it.

Note: Unlike the various medical plans, groups can only choose one bundle within each ancillary type. Upon making and reviewing all of your elections, click the green **Save & Continue** button in the bottom-right corner of the screen.

Deselect Bundle Show less detail Plans only available when selecting the entire plan bundle.

<input checked="" type="checkbox"/>	Guardian Managed DentalGuard DHMO Guardian DMO	view plan details >	<input type="checkbox"/> Compare Plan
<input type="checkbox"/>	Guardian DentalGuard Preferred PPO MAC Guardian PPO	view plan details >	<input type="checkbox"/> Compare Plan

HIDE PLANS ▲

Dental Package 3[^] - Guardian Managed DentalGuard DHMO <i>Plus</i> and Guardian DentalGuard Preferred PPO <i>Plus</i> MAC

Dental Package 3[^] - Guardian Managed DentalGuard DHMO *Plus* and Guardian DentalGuard Preferred PPO *Plus* MAC

The DHMO *Plus* plan covers visits to In-Network participating dentists. A referral is required to see a specialist.

The PPO *Plus* plan covers visits to In-Network participating dentists as well as Out-of-Network non participating dentists. A referral is not required to see a specialist.

Select Bundle (2) Show less detail Plans only available when selecting the entire plan bundle.

<input checked="" type="checkbox"/>	Guardian Managed DentalGuard DHMO Plus Guardian DMO	view plan details >	<input type="checkbox"/> Compare Plan
-------------------------------------	---	--	---------------------------------------

DEFINED CONTRIBUTION

The next page will present the option to create a contribution strategy. To create a contribution strategy, select the blue **Create a Contribution Strategy** button; otherwise select the **Skip This Step** option.

Company Name: Sterling Cooper

A Contribution strategy is a set of rules for how your contributions to employee benefits will be applied and used. Think of this as how much you, the employer, will be paying for your employee's benefits.

Create a contribution strategy in three simple steps:

- 1**
Employees & Plans
Select the employees and benefits to include in your strategy.
- 2**
Contributions
Decide whether to contribute a simple lump sum to all plans, a lump sum to a single plan, or a specific amount to each benefit.
- 3**
Leftover
Set rules around how your employees can spend the leftover dollars from your contributions.

[Skip This Step](#) [Create a Contribution Strategy >](#)

BANK INFORMATION

The next page will ask you to add or review your bank information. Select **Pay by Check** if your group plans to pay by check; otherwise review your information for accuracy. When finished, check off the **I agree** option and press the **Save & Continue** button towards the bottom of the page.

Bank Information

Add your employer organization's banking information for fast and accurate processing of your monthly HealthPass NY invoices.

* Pay by Check

* Withdrawal Type

Make initial payment

* Account Type

* Banking Institution Name

* Business Account? Yes No

* First Name on Account

* Last Name on Account

* Routing Number ⓘ
Must be nine digits

* Account Number ⓘ

By clicking "I agree" Employer is certifying that:

The banking information provided above is accurate and will report any future changes in banking information to the Administrator.

I agree

✔ Save & Continue

START ENROLLMENT

Open your group's enrollment window by selecting your desired option and pressing the blue button towards the bottom of the screen.

Start an Open Enrollment window for employees will guide you to the User Administration page, where you can make member-level changes individually (*see HOP Renewal Guide*).

- Choose the **Yes, send an email notification** suboption to send an open enrollment notification email to members (NOTE: they must have a valid email address in the system, though members without one can still log in with a username and password).
- You have the option to edit the **Email From** field, with the default address being *hpmemberservices@bswift.com* (check your spam folder).
- Otherwise choose the **No, do not send an email notification** suboption.

Company Name: Sterling Cooper

Start Enrollment

Open Enrollment: February 28 – April 30

Select an option below to start an Open Enrollment window.

The 1st option enables employees to make their own benefit coverage selections.

The 2nd option enables you to make benefit coverage selections on behalf of your employees.
How would you like to proceed for employee enrollment?

- **Start an Open Enrollment window for employees:**
 - **Yes, send an email notification**
 - No, do not send an email notification
- Complete employee enrollments on their behalf

Send Email and Start Enrollment >

Email From
hpmemberservices@bswift.com

Email Subject
Open Enrollment has begun

Email Text
Open Enrollment has now begun for your company. Please login to www.healthpass.bswift.com to complete your enrollment.

Text: no more than 7,500 characters. HTML formatting is available.
Click [here](#) for HTML tips.

Include username

Your Employees

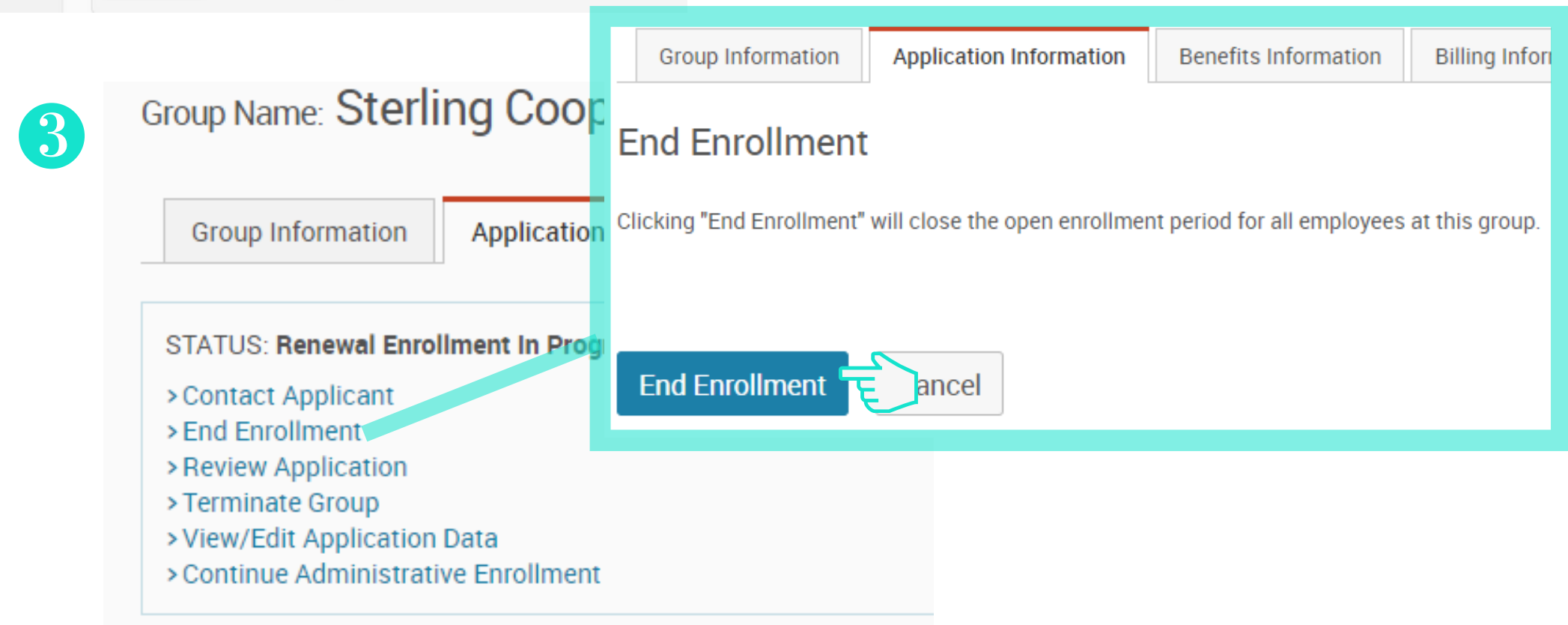
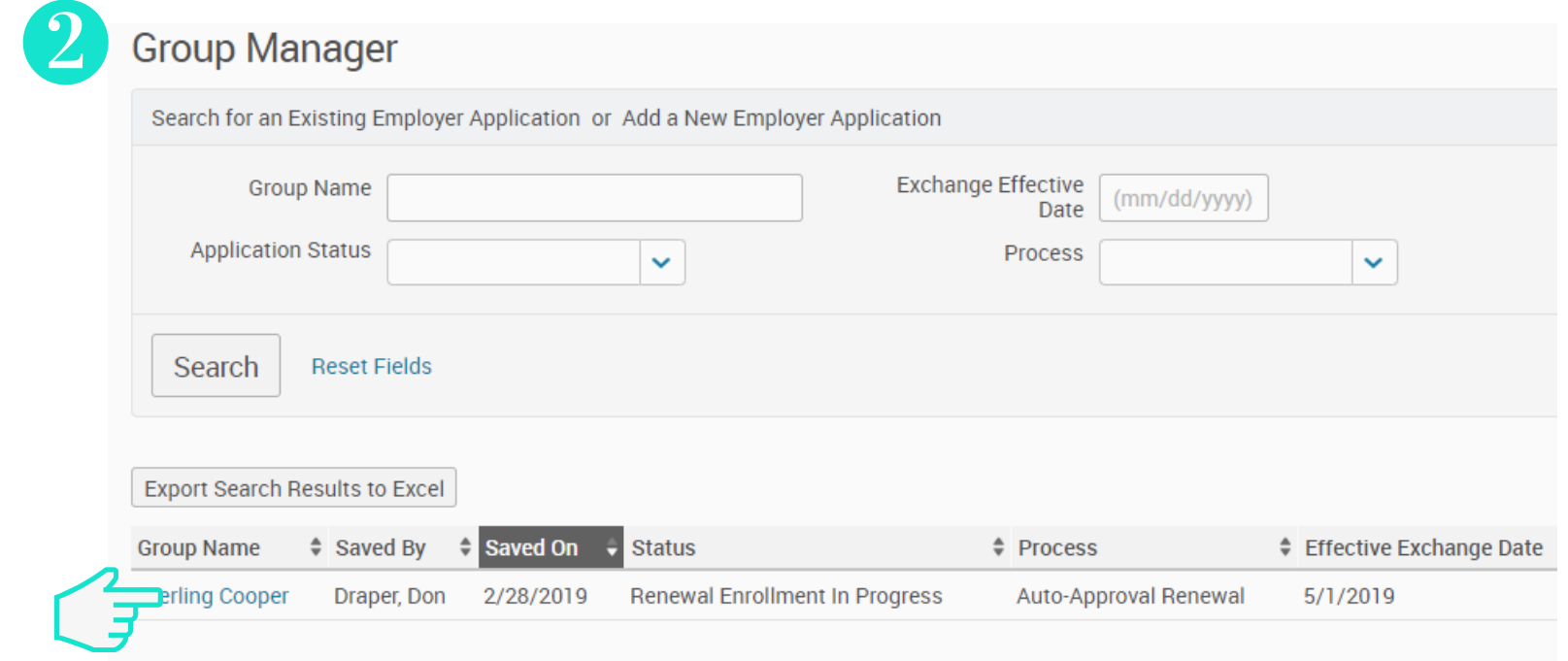
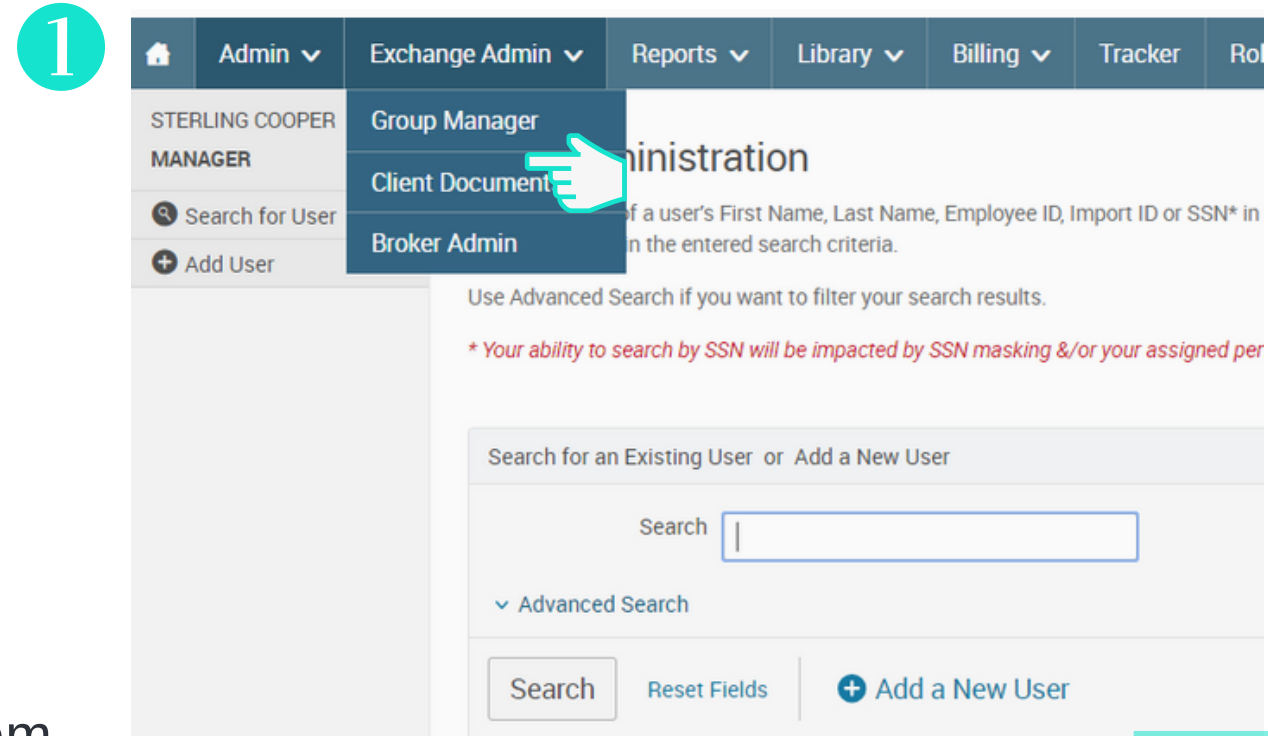
The employees below will receive an email notification letting them know they can log in and enroll in their benefits. If an employee is listed without an email address that means we don't have one on file. Employees without an e-mail address can still log in and enroll.

First Name	Last Name	Email Address
------------	-----------	---------------

ENDING ENROLLMENT VIA GROUP MANAGER

To end enrollment via **Group Manager**:

- 1 scroll over the **Exchange Admin** tab and select **Group Manager** from the dropdown menu
- 2 click your group name in blue
- 3 select **End Enrollment** from the menu, and then select it once more on the next page



ENROLLMENT COMPLETE

To confirm you've successfully ended your group's enrollment, select **Exchange Admin** and **Group Manager** once more.

1 The status should now read **Renewal Enrollment Complete – Pending Audit**. Your submission will be reviewed and responded to within 1-2 business days.

2 When your group's renewal is approved, the status will read **Active in Exchange** and a confirmation email will be sent to the primary contact, broker and general agent (if applicable) from *renewals@healthpassny.com* (once again, check your spam folder).

1 **Group Manager**

Search for an Existing Employer Application or Add a New Employer Application

Group Name Exchange Effective Date

Application Status Process

[Reset Fields](#)

Group Name	Saved By	Saved On	Status	Process	Effective Exchange Date
Sterling Cooper	Draper, Don	2/28/2019	Renewal Enrollment Complete - Pending Audit	Auto-Approval Renewal	5/1/2019

2

Group Name	Saved By	Saved On	Status	Process	Effective Exchange Date
Sterling Cooper	Rumsen, Freddie	3/13/2019	Active In Exchange	Auto-Renewal	5/1/2020