

HEALTHPASS ONLINE PORTAL **RENEWAL GUIDE**

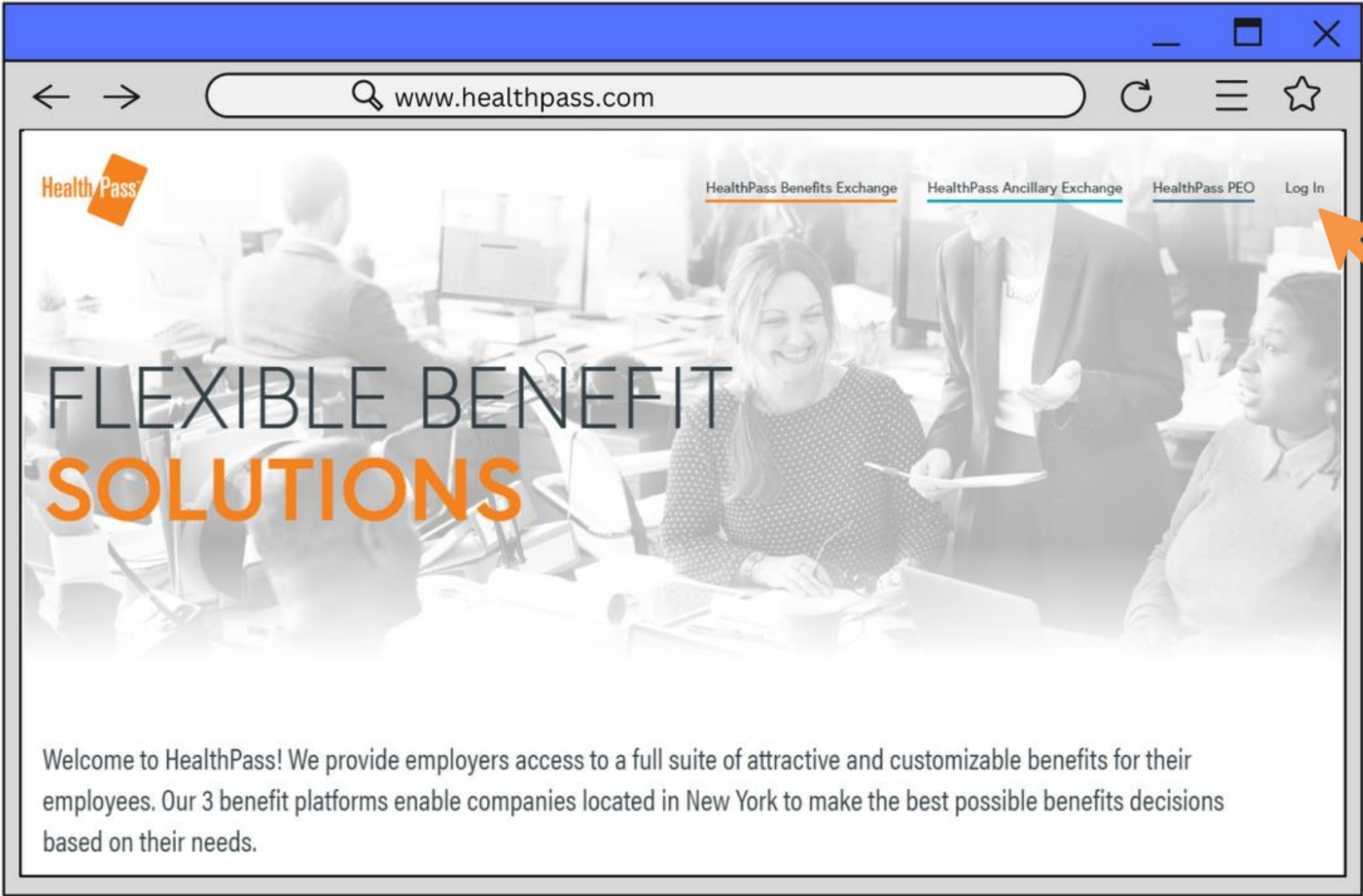
Renew your group benefits online.



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Introduction

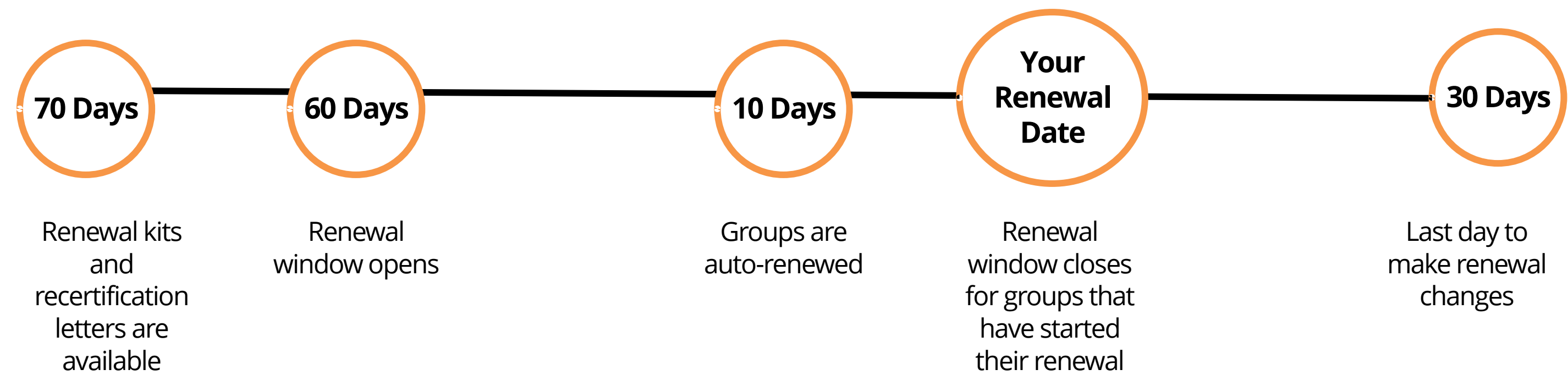
Welcome to the HealthPass Online Portal (HOP) Renewal Walkthrough! We understand that renewing your group's health insurance can be a daunting process as you struggle to keep track of the various options, procedures and requirements.

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 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.

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

Renewal Timeline

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



Access your renewal kit

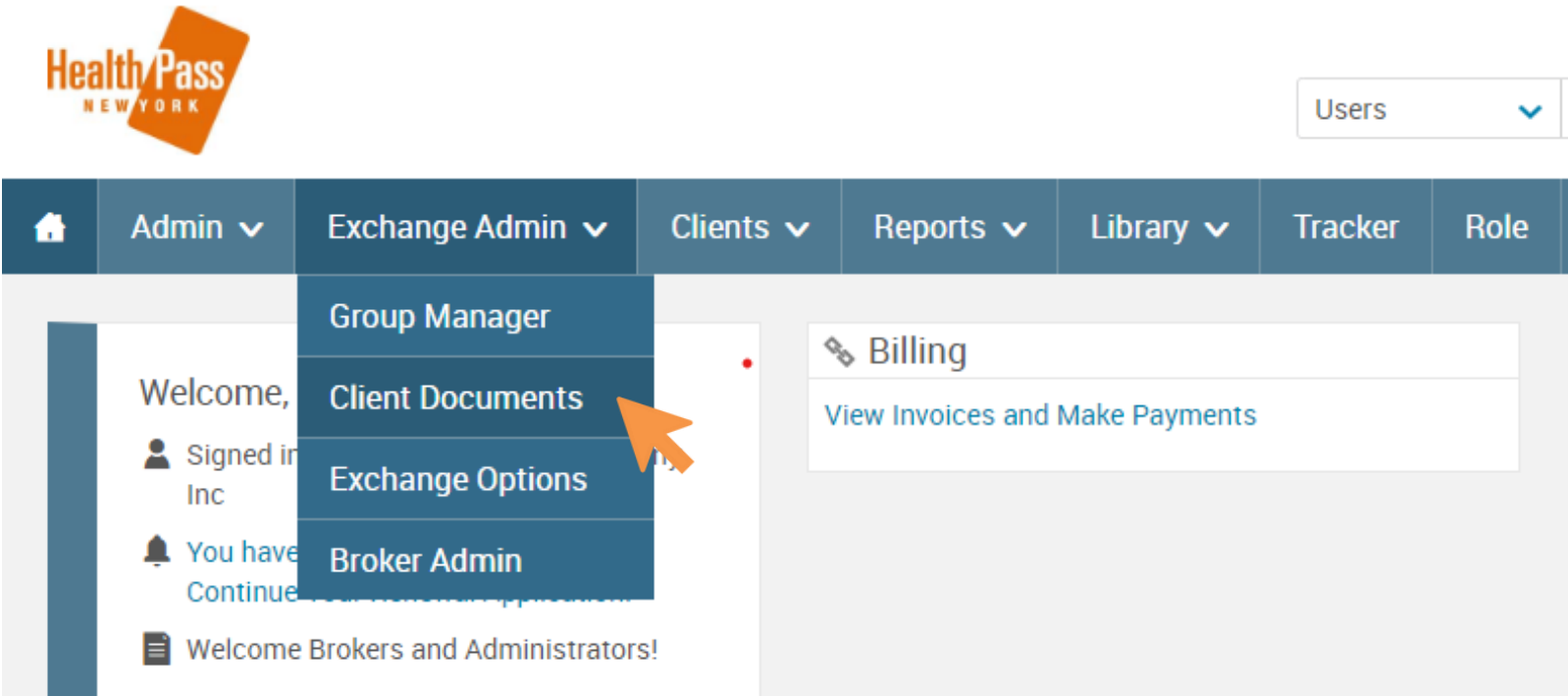
Your renewal kit is posted online 70 days prior to your renewal date.

How to access your renewal kit :

- Log into the HOP
- On the top navigation, hover over Exchange Admin, then click Client Documents
- Click on the blue links to view the posted documents

Was your group selected for recertification?

If your group was selected for mandatory audit, or recertification, you will find a “Recertification Audit Letter” posted in your Client Documents.



Client Documents

Search for an Existing Client Documents

Document Name

Client Document Type

[Reset Fields](#)

<input type="checkbox"/>	Document Name	Date Imported	Type
<input type="checkbox"/>	Q4 2022 Renewal Kit Forms	10/03/2022	Renewal Kits
<input type="checkbox"/>	Recertification Audit Letter	09/16/2022	Other
<input type="checkbox"/>	Renewal Kit December 2022	08/29/2022	Renewal Kits

Renewal document requirements

You may be required to submit documentation in order to process your renewal and continue your group policy. This chart will help you determine whether documentation is required for your renewal.

No Changes	Employee Level Changes	Group Level Changes	Mandatory Audit, or Recertification
<i>Groups not making changes to their policy or employee coverage. If your group was selected for recertification, the applicable renewal documentation are still required.</i>	<i>Groups only making changes to employee coverage.</i>	<i>Groups making changes to their hours worked per week to be eligible for coverage; COBRA Administration participation and/or ancillary (dental and vision) product offering(s).</i>	<i>Groups selected for mandatory recertification. A notice is sent 90 days prior to your renewal date.</i>
No documents required	Submit completed Renewal Attestation Form	Submit notated tax documents	Submit notated tax documents

NOTE: The renewal window closes on the 20th of the month prior to your renewal date for groups who have not started their renewal application. Groups making changes **after** this time must send required documents in addition to their signed renewal application to renewals@healthpass.com to re-open the renewal.

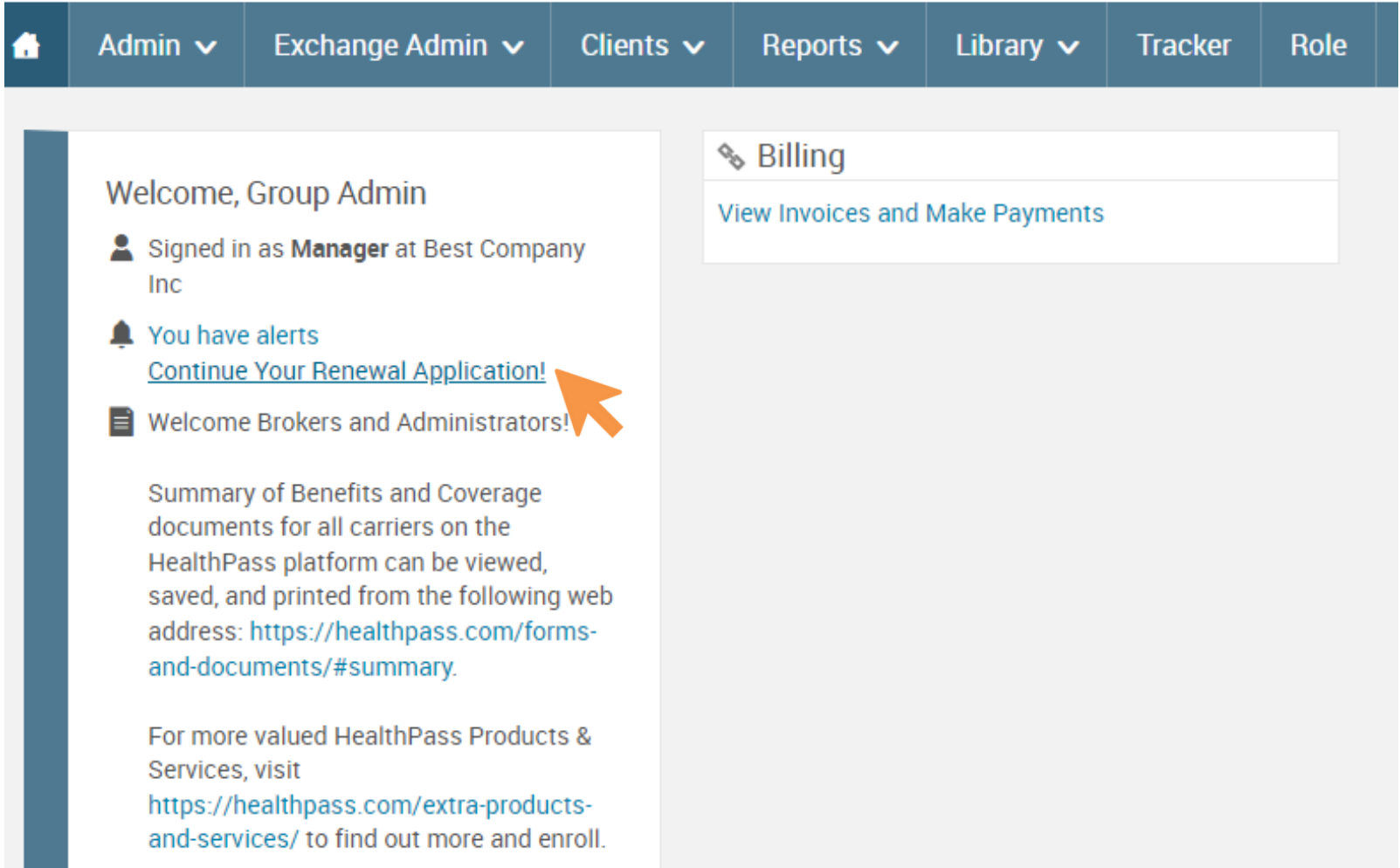
Starting your renewal

Start your online renewal after gathering your required documents.

Log into the HOP

Click “Continue Your Renewal Application”

NOTE: If this link does not show, the renewal window may have closed.
Contact the renewals department for assistance.



Review your company information

Review and update your company information as needed.

Upload the required documents by clicking “Choose File”.

Specify the type of document uploaded.

Click Save and Continue.

Your Company

Your Employees

Group Elections

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/ or additional documents. After saving a section your 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 from last year's application are pre-populated for your convenience.

* Fields are required

Your Company

* Full Name of Company

Best Company Inc

Doing Business As (DBA) Name

Best Company Inc

* Federal Tax ID Number

xx-xxxxxxx

* Date Company Founded (MM/DD/YYYY)

01/31/2020

Your Benefits With HealthPass

* Are you interested in offering FSA & Commuter Benefits to your employees?

Yes

●

No

* COBRA/NYSC Administration Services? (included service)

●

I would like to participate in the COBRA Administration

I would like to opt out of COBRA Administration

COBRA - Federal or State

Federal (Greater than 20 Employees)

●

State (Less than 20 Employees)

* **NOTATED** NYS 45 / Tax Documents or Renewal Attestation Form

Choose File

No file chosen

Additional Documentation 1

Choose File

No file chosen

Additional Documentation 2

Choose File

No file chosen

Additional Documentation 3

Choose File

No file chosen

Additional Documentation 4

Choose File

No file chosen

* Document Upload Type

NYS45 / Tax Documents

Renewal Attestation Form

Save and Continue >

Review broker information

Review your Broker and General Agent information and then click Save and Continue.

Your Company

Your Employees

Group Elections

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.

Search for Code

Search

Clear Search

Selected Broker(s)

Type	Name	Agency	Commission	Remove
Broker	Best Broker	Best Agency	100.1 %	
Commission Total (must total 100%)			100%	

Selected GA

Type	Name	Agency	Remove
GA	General Agent	Best Agency	

Back

Save and Continue >

Review your employee census

Review your employee census.

Add employees as needed by clicking Add a New User .

Click Save and Continue.

A subsequent message appears, Click OK.

Your Company

Your Employees

Group Elections

Company Name: Best Company Inc

Your Employees

Take a look at your current employees. Is anyone missing? If so, add them now so they are automatically included in your open enrollment this year.

+ Add a New User

Last Name	First Name	Middle Initial	SSN	Employment Status	Number of Dependents	Login Name
Day	Jessica			Active	1	JDay1234
Knight	Jay			Active	0	Jkni1234

✓ Save and Continue

Please wait, your renewal is being processed!

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 enrollment!

OK

Cancel

Review your plan offerings

Your application is now in Group Elections.

Choose the medical and ancillary plans you would like to offer 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.

NOTE: At this point of the application you will no longer be able to edit your Company Information. Any changes should be submitted using the Renewal Application and forwarded to renewals@healthpass.com for processing.

Your Company

Your Employees

Group Elections

Company Name: Best Company Inc

Your Plan Options

Select Medical Plans 2022

Select 1 Dental Package

Select 1 Vision Package

Select FSA & Commuter Plans

Select Life/AD&D/LTD Plans

Select Accident Plan

Select 1 ID Theft Package

Select Pet Plan

Continue to Next Step >

Highlight Plans By

Individual Deductible

\$0.00 - \$8,550.00

Family Deductible

\$0.00 - \$17,100.00

Individual Out-of-Pocket Maximum

\$0.00 - \$8,700.00

Family Out-of-Pocket Maximum

\$0.00 - \$17,400.00

Co-insurance

0% - 50%

Create defined contribution strategy

Create a defined contribution strategy. Enter the dollar amount (if any) to be contributed toward your employees’ benefit costs.

Continue to Next Step.

Your Company

Your Employees

Group Elections

Company Name: Best Company Inc

Determine How to Apply Your Contributions

Please note that if your monthly contribution exceeds \$2000 Advanced Setup must be used

Your previous year strategy had an advanced setup. You can create a new streamlined strategy below or [continue with advanced setup](#).

☐ No Contribution

☐ Lump Sum \$

☐ Contribute Per Plan Type

Continue to Next Step >

1 Group Elections

Plan Offerings

Defined Contributions

Banking Information

2 Start Enrollment

Review your bank information

Review your bank information by clicking the “Payment Information” link.
Select a Paperless Billing option.
Agree and continue.

Your Company

Your Employees

Group Elections

Company Name: Best Company Inc

Bank Information

Select the link below to add or update your employer organization's bank information for a one-time or recurring monthly payment. Select "Pay by Check" if you prefer to mail your payment.
[Payment Information](#)

* Pay by Check

☐

* Enroll in Paperless Billing

☒ Yes ☐ No

By clicking "I agree" Employer is certifying that:

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

☒ I agree

Save & Continue >

1 Group Elections

Plan Offerings

Defined Contribution

Bank Information

2 Start Enrollment

Start Open Enrollment

Select an option to start an open enrollment window.

- Option 1: Select “Yes, send an email notification” to email all eligible employees. A pop-up will appear to customize your open enrollment email before sending.
- Option 2: Select "Complete employee enrollments on their behalf" to make benefit coverage selections on their behalf.

Company Name: Best Company Inc

Start Enrollment

Open Enrollment: October 17 – December 01

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.

For more valued HealthPass Products & Services, such as a POP Kit Section 125 and Beyond Med, visit <https://healthpass.com/extra-products-and-services/> to find out more and enroll.

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

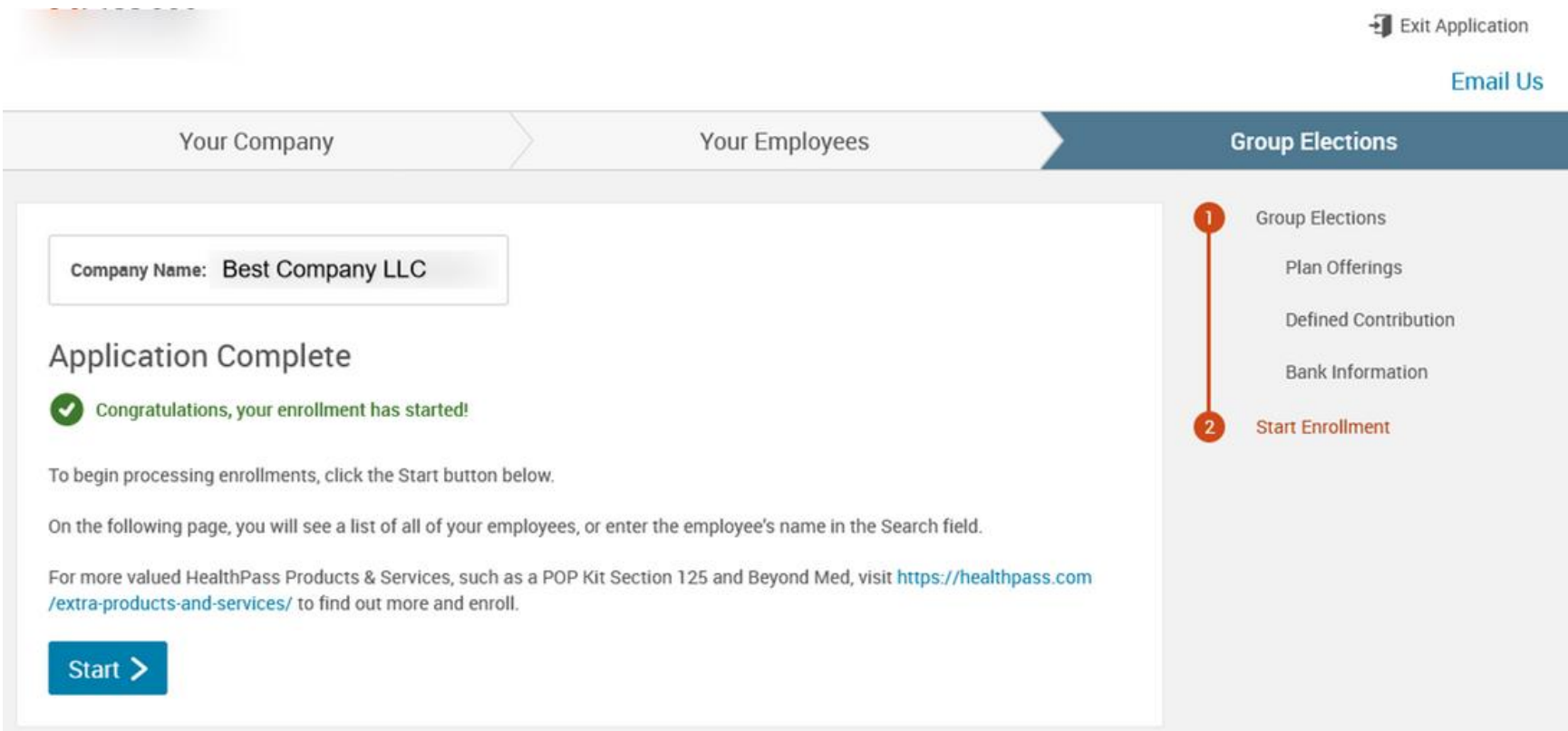
[Send Email and Start Enrollment >](#)

Open Enrollment has begun!

Your application status is now “Enrollment in Progress”.

If you chose to send an email notification to all employees, emails have been sent notifying employees they are now able to log in an make their elections. Emails are sent from communications@healthpass.com.

If you chose to complete enrollments on your employees behalf, you will be directed to the Quick Admin Enrollment page.

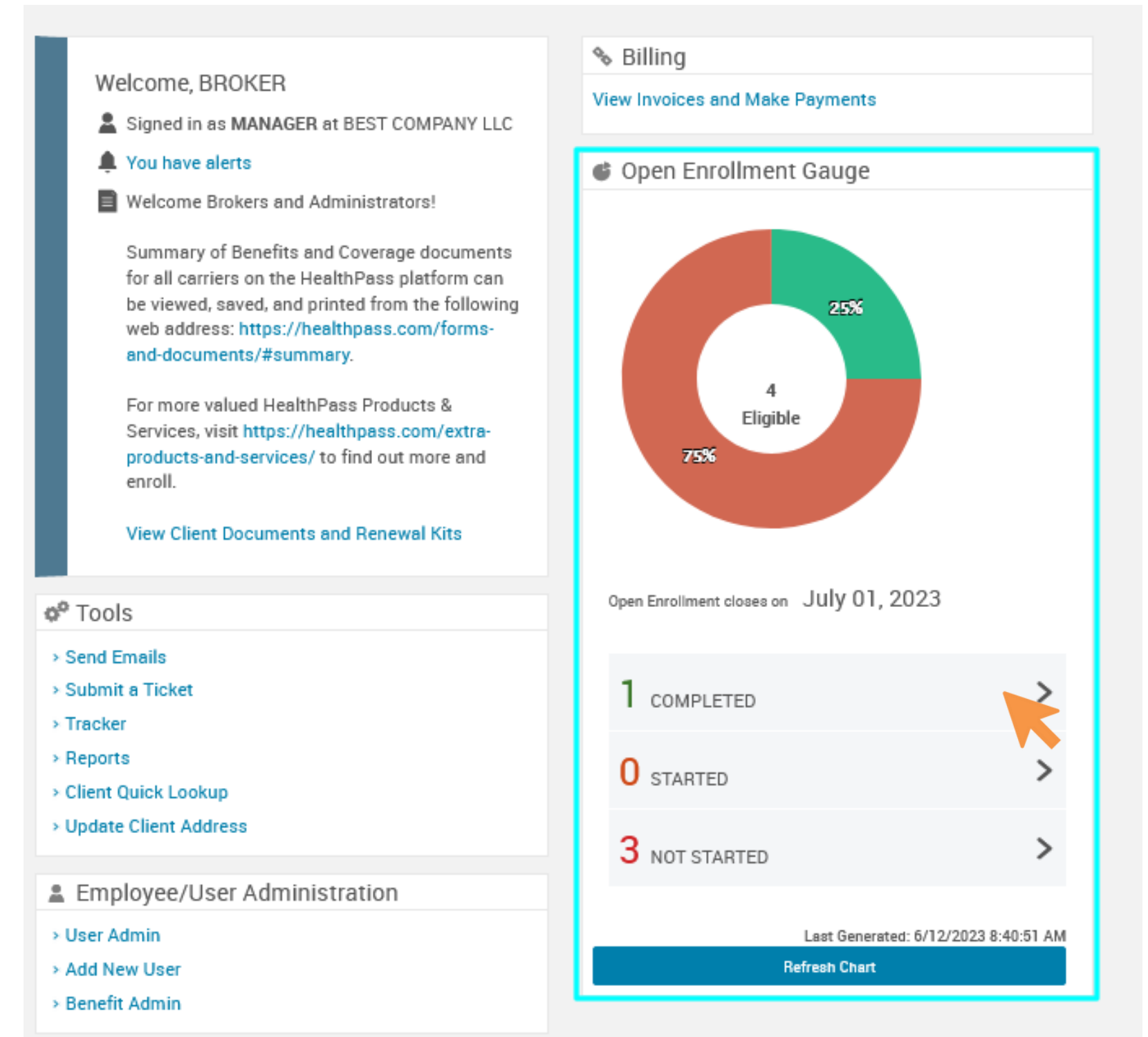


Track open enrollment progress

Quickly view the status of open enrollment using the Open Enrollment (OE) Gauge. The OE Gauge appears in the child site's admin homepage whenever a group has an open enrollment window at new group installation or renewal.

- Find out who has completed, started, and/or not started their open enrollment.
- Click on the corresponding arrows to detailed information for a group of employees. A report will open in a new tab.
- Send emails to employees directly from the portal

NOTE: *If no open enrollment window is open at a site, the panel will not appear.*



End Enrollment

Once all employees have made their plan selections you will need to “End Enrollment” to complete your renewal and submit your application for review.

Navigate to Exchange Admin, then Group Manager.

Select your group.

Click "End Enrollment".

NOTE: Once enrollment has ended, employees cannot make changes to their plan selections. The HealthPass Team will review your submission and contact you if additional information is needed. If your submission is complete, a confirmation email will be sent.

Group Manager

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

Group Name

Exchange Effective Date (mm/dd/yyyy)

Application Status

Process

Search

Reset Fields

Export Search Results to Excel

Group Name	Saved By	Saved On	Status	Process	Effective Exchange D
Example Company	Nicole	9/3/2019	Renewal Enrollment In Progress	Auto-Approval Renewal	11/1/2019

Admin

Exchange Admin

Clients

Reports

Library

Billing

Tracker

Role

EXAMPLE COMPANY

TOP DOG

Search for Group

Group Name: Example Company

Group Information

Application Information

Benefits Information

Billing Information

Broker Information

STATUS: Renewal Enrollment In Progress

> End Enrollment

> Review Application

> Continue Administrative Enrollment

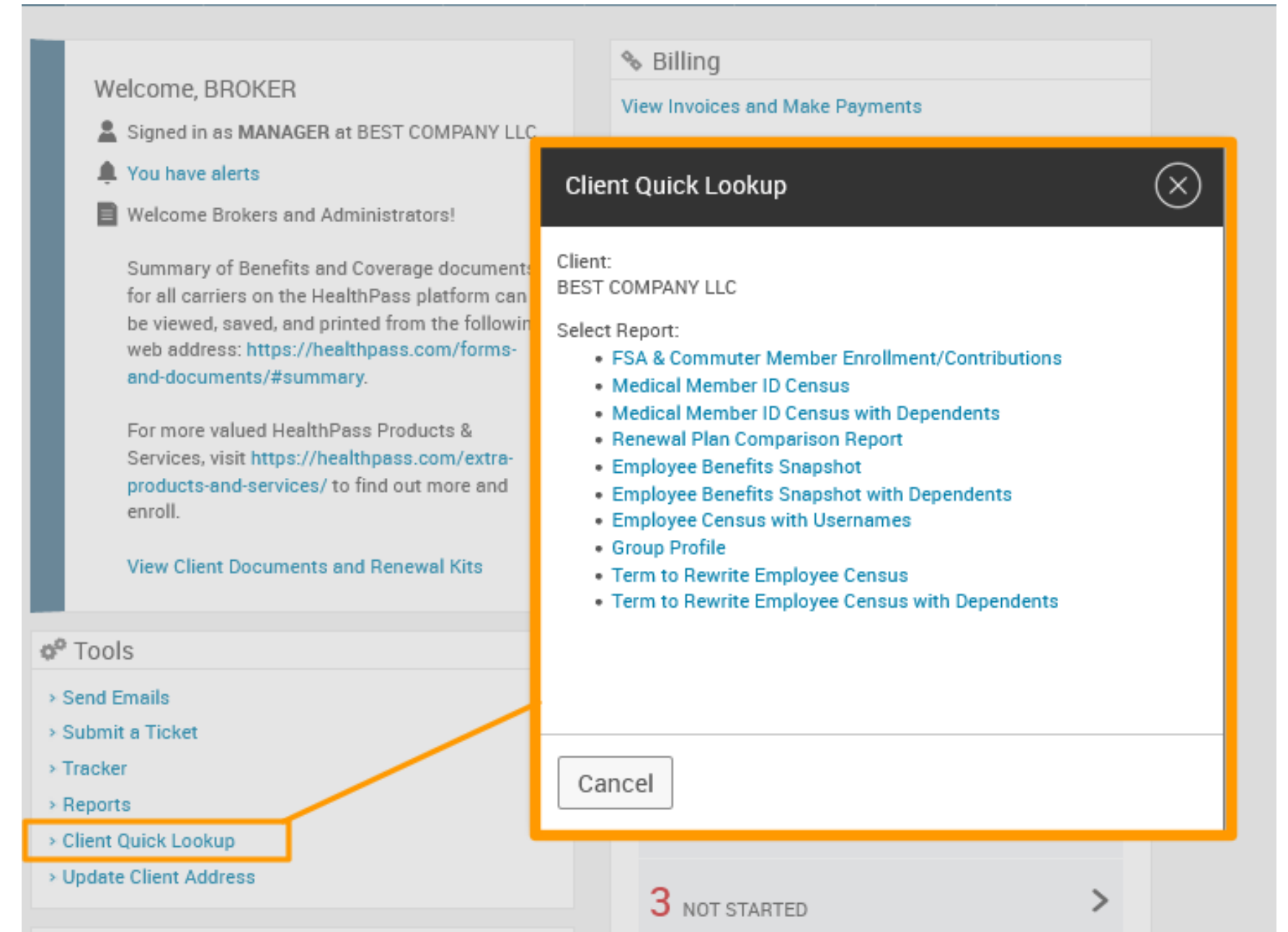
Application Details

Client Name	Example Company
Original Applicant	Broker
Original Applicant Email	Broker@unknown.com
Original Application On	10/15/2019

Reports

Review employee enrollments using reports. Client Quick Lookup reports are the most commonly used reports on the Admin Homepage for easy access.

- **Renewal Plan Comparison Report** shows benefit elections for all employees based on two dates selected, even if no change occurred
- **FSA & Commuter Member Enrollments/Contributions** report shows all members enrolled in an OCA plans with contribution amounts
- **Medical Member ID Census** report shows all members ID numbers
- **Employee Benefits Snapshot** report shows all enrolled and waiving employees with plan names, coverage effective dates, and premium amounts
- **Employee Census with Usernames** report shows all Active/Eligible employees username and email information for HOP access to self-enroll



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Need help? Contact the Retention Team at
renewals@healthpass.com or 888-313-7277.



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