

New Group Enrollment Checklist – Healthy NY

All forms listed should be completed in their entirety and signed by the authorized group contact or decision maker. Any missing or incomplete information may delay your group's implementation, as we will need to contact you.

___ **Healthy NY Group Application** – Most current version 10/2017.

___ **Proof of Payroll** – NYS-45 – Most recent available quarter filed.

- Each employee appearing on the NYS-45 must be noted to indicate eligible, not eligible or termed.
- Notations should be based on the employer's eligible class(es) (Eligibility Policy Form).
- Employees working fewer than 20 hours per week are ineligible.
- If an eligible employee's or owner's wages reported on the NYS-45 do not support a minimum of 20 hours per week, current paystub or payroll journal must be included.
- Current paystub or payroll journal for any new eligible employee not appearing on the NYS-45 is required.
- If no NYS-45 is available, a payroll register may be accepted.
- If no payroll register is available, W-4 forms may be accepted if completed in full (1-10) but must also be accompanied by a list of all employees and their positions, hourly rate, hours worked per week, and notated with who is eligible and not eligible. (This is needed to verify HNY wage and participation requirements).

___ **Most Recent Tax Documentation**

- **If a group is enrolling at least four employees and any enrolling owner appears on the NYS-45, company tax documentation is not required.**
- **If a group is enrolling fewer than four employees and/or an enrolling owner does not appear on NYS-45, the most current company tax documentation will be required. If the most recent tax year has not been filed, the most recent filing along with a copy of a filed extension will be required.**
 - S-Corp – Schedule K-1s for ALL owners from the most recent tax year.
 - C-Corp – Pages 1-3 of the most recent year's 1120 along with the Schedule G & 1125E.
 - Partnership – Schedule K-1s for ALL owners from the most recent tax year.
 - Sole Owner – Most recent year's Schedule C or Schedule F.
 - Non-Profit/Charitable Organizations – Pages 1-3 of the most recent year's Form 990. If exempt from filing, a copy of the IRS Exemption Notice must be provided.
 - Start-up Company operating less than one year must provide acceptable documents (for example: business certificate, articles of organization, operating agreement, receipt of Federal Tax ID number (SS-4) or similar documentation that the business is authentic). The SS-4 letter can suffice as proof of ownership if it states "Sole MBR".
 - If a tax extension was filed for the most recent year provide filed tax extension along with prior year's ownership tax documentation.

___ **Subscriber Application Forms** – Completed by the subscriber. *Codes must match those on rate sheet.*

___ **Waivers** (Required for all eligible employees not enrolling and must be completed in full).

___ **Eligibility Policy Form** (Required to select 20 hours per HNY guidelines).

___ **Rate Sheet(s) and Benefit Summary** - Signed by group decision maker or authorized group contact.

MISCELLANEOUS DOCUMENTATION REQUIRED WHEN APPLICABLE:

___ Broker of Record Letter.

___ Disabled Dependent Application (Disabled dependent child over age 26, must accompany subscriber's app).

___ Young Adult Certification (If group has Age 30 rider and employee is enrolling a child over age 26)

___ Religious Exemption Form (If group is requesting removal of Family Planning benefits).

Excellus BlueCross BlueShield retains the right to request additional information for verification if conflicting information is found on public sources.