

Quick Reference Guide – How to Update A Policy

Overview

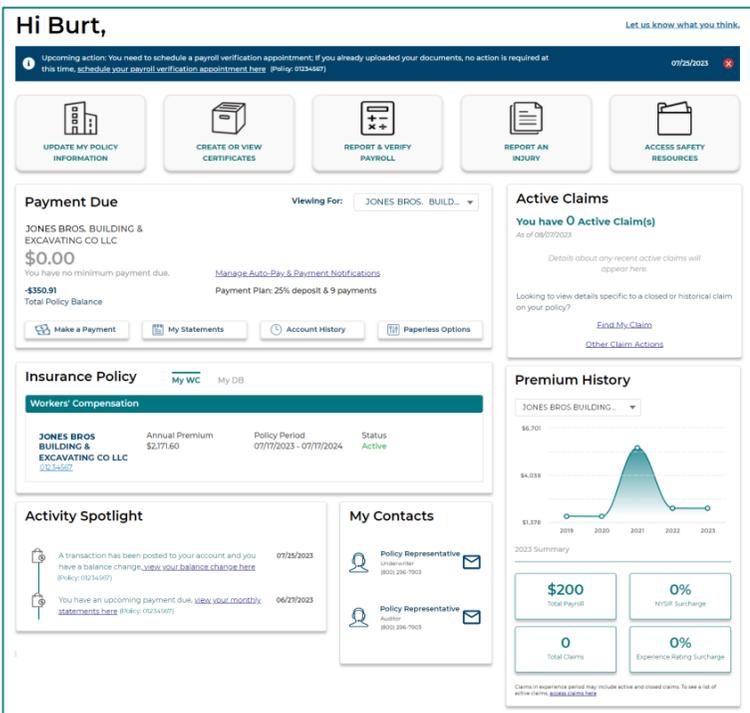
Your business and coverage needs may change throughout the year. To ensure updates are accurately reflected in your policy coverage and premium, it is important that NYSIF has your most up-to-date business information. After submitting your request, a NYSIF policy representative will review your information and you will be notified when your policy has been updated.

What Policy Information Can I Update?

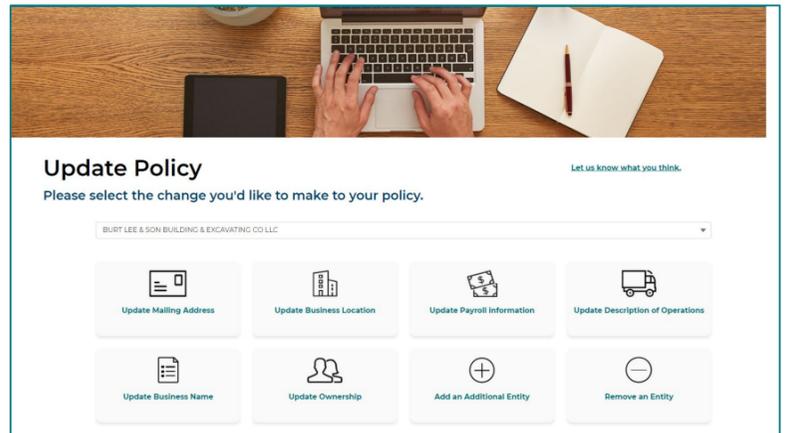
- Mailing Address**
- Description of Operations**
- Add an Additional Entity**
- Business Locations**
- Business Name**
- Remove an Entity**
- Payroll Information**
- Ownership**

Key Steps:

1 Log into the portal and select “Update My Policy Information.”



2 Select the appropriate update button(s).



3 Provide requested information and click “Submit” to complete.

Description of Operations

Update Made to: JONES BROS. BUILDING & EXCAVATING CO LLC

Provide a description of your new operations.

Examples: Consulting, Masonry, Software Sales, etc.

Let us know a few additional details.

These operations are replacing my existing operations.

These operations are in addition to my existing operations.

Other, please specify:

Do you know the payroll associated with these operations?

Yes, I would like to provide payroll information now

I don't have this information

Not sure? That's ok! A Policyholder Representative will reach out to help you with the process.

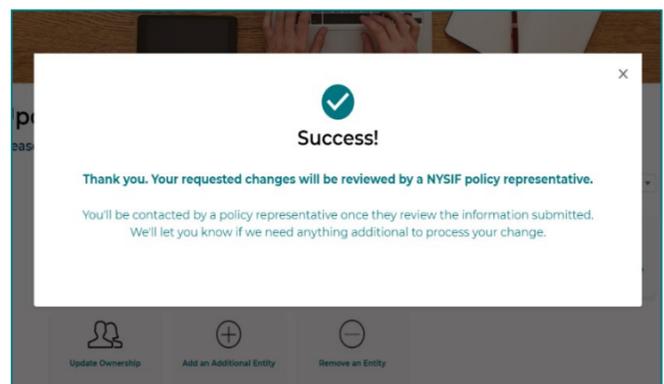
When is this change effective for your business?

Please indicate the date of the event requiring a change to your policy. A NYSIF representative will review your submission to determine the appropriate effective date of change and will apply it to your policy.

Date:

By checking this box, I affirm that I am legally authorized to make these changes to the policy.

4 You will see a “Success” screen as confirmation of your submission.



Sometimes a change in business can have a broader impact on your coverage. We encourage you to **submit all applicable business and coverage changes** by clicking on all the appropriate update button(s). Please note **you will not be able to save your progress when updating policy information**. First, collect all the required information you will need and plan to submit your updates in one browser session.

Have a Question?



Email

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888.875.5790



Quick Reference Guide – How to Verify Payroll Online

Overview

Your billed premium is based on the payroll estimate you provide at the beginning of the policy year. Payroll verification is necessary in order to reconcile any differences between the estimate and actual payroll in a policy year.

What will I need?

Verify payroll for a Workers' Compensation Policy...

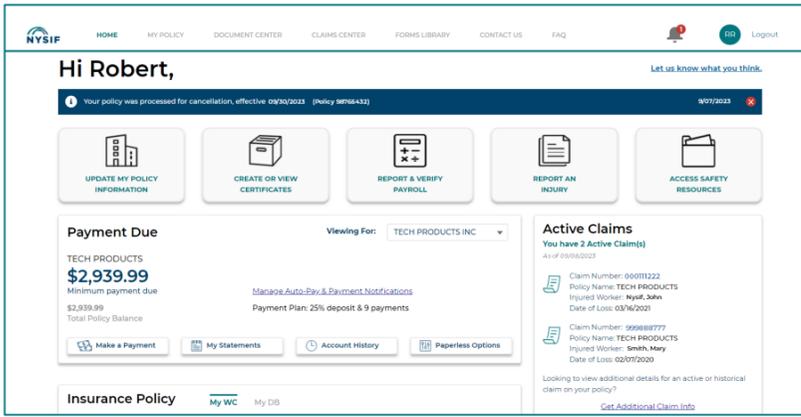
-  Business Name, FEIN, Business Type, Mailing Address, and Business Contact Info
-  Owner, Officer, Member, Partner Information (Manual Class Codes, and Total Gross Wages)
-  Worker Information (number of employees, total gross wages, overtime, etc.)
-  Other Wage Information (1099 Payment, Casual Labor, Leased/Subcontractor information, and total gross revenue)

Verify payroll for a Domestic Workers' Comp Policy...

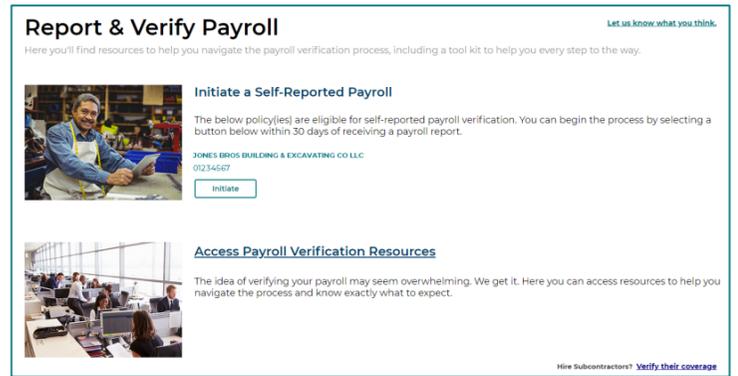
-  Household Name, SSN, Mailing Address, and Contact Information
-  Worker Information (number of domestic household workers, and number of locations)

Key Steps:

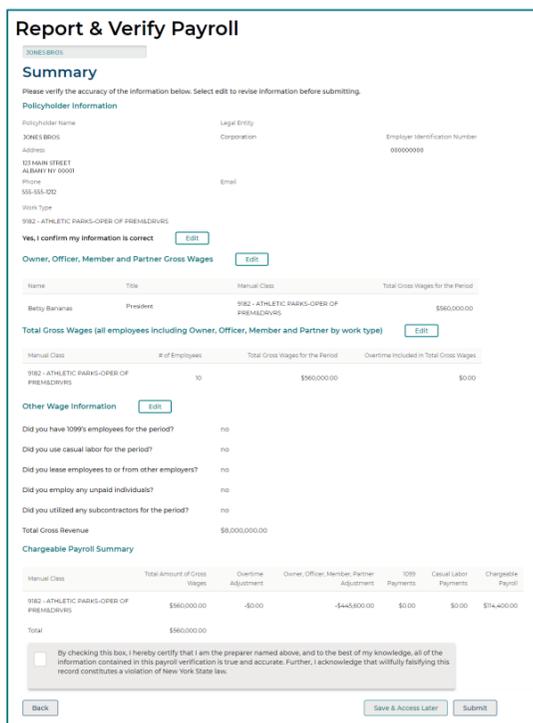
1 Log into the portal and click on the “Report & Verify Payroll” button.



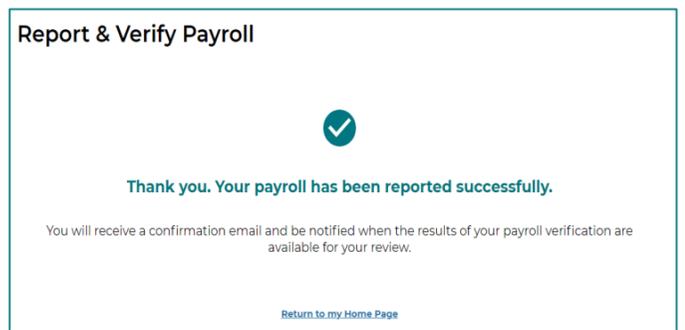
2 Click the “Initiate” button beneath the respective policy.



3 Verify all required fields on each page. Click “Next” to continue. Review the summary page; click “Submit.”



4 You will see a “Success” screen as confirmation of your submission



To save your report progress, click “Save & Access Later.” You will be asked to confirm your email address. You’ll receive a notification in the portal and be able to come back later and continue your payroll report.

Need to change something on the Summary page? Click “Edit” next to the appropriate section you wish to update.



Have a Question?



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Quick Reference Guide – How to Create & Manage Certificates

Overview

The online portal provides you with easy-to-use self-service options to create, renew, delete, or duplicate and edit a certificate. The “Duplicate & Edit” functionality allows you to quickly create a new certificate by using data from an existing one.

What will I need and What can I do?

What do I need to create a certificate?

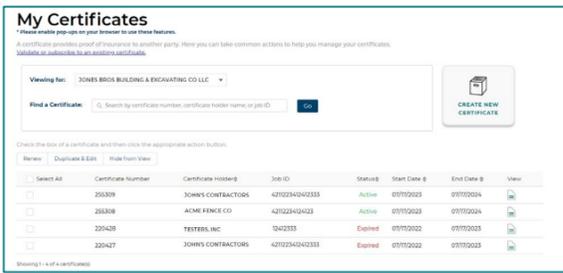
- Basic Information such as policy number, entity name, associated location, and valid policy period
- Certificate holder information, including certificate holder name and address
- Certificate options such as automatic renewal options and email recipients of certificate

Available actions to manage your certificates:

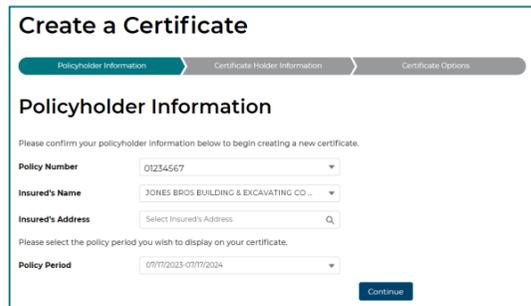
- Search Certificates by Attributes
- Renew One or Multiple Certificates
- Duplicate and Edit from an Existing Certificate
- Hide a Certificate from View

Key Steps – Create a Certificate:

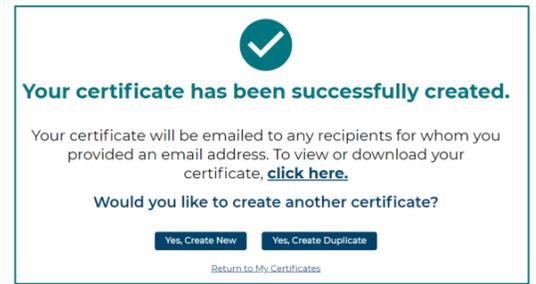
1 Click “Create New Certificate” on the certificate landing page.



2 Complete all required fields on each page. Click “Continue” to move to the next page.

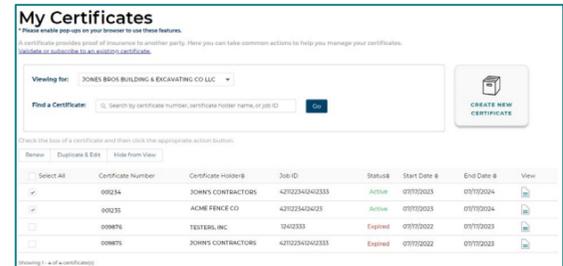


3 On the Certificate Options page, choose your options and click “Create.” The confirmation screen will offer the chance to view or download the certificate.

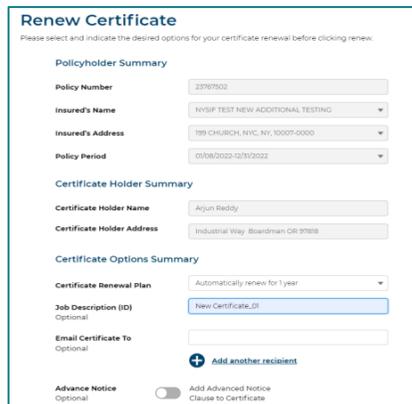


Key Steps – Renew Certificate(s):

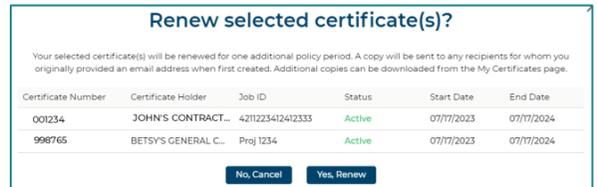
1 Select the certificate(s) from the table to renew; click “Renew.”



2 Review & update information on the pop-up screen and click “Renew”

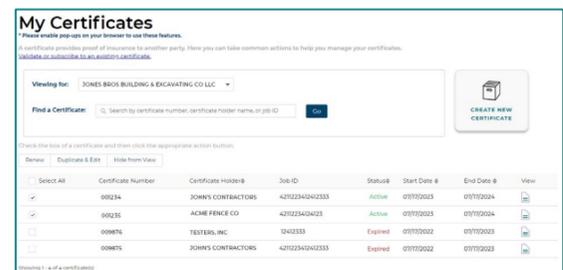


3 To renew multiple certificates, click the appropriate selection on the summary screen

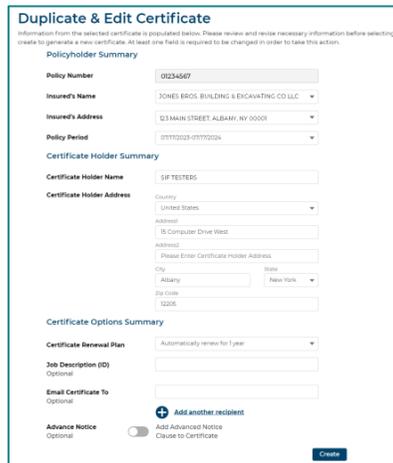


Key Steps – Duplicate & Edit a Certificate:

1 Select one certificate from table to duplicate, click “Duplicate & Edit.”



2 Review and update information on the pop-up screen, click “Create”



3 The confirmation screen will offer the chance to view or download the cert.



Use the “Hide” option to hide unwanted certificates from the “Manage Certificates” table view. You can hide one or multiple certificates at a time. You will need to contact your policy representative if you have accidentally removed a certificate that you need.

Have a Question?



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Quick Reference Guide – How to Request a Quote

Overview

Use the Policyholder Portal to easily request a quote for workers' compensation coverage from NYSIF.

What will I need?

If you are seeking coverage for your business...

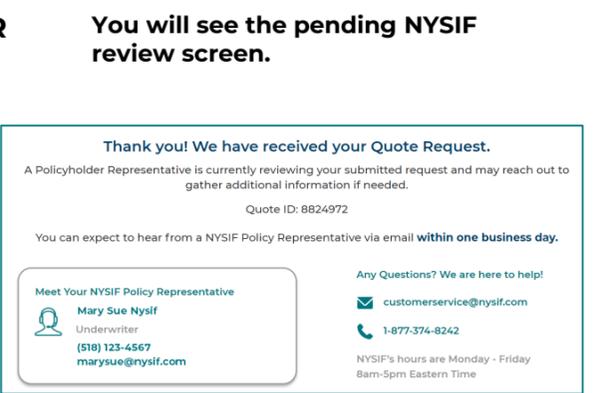
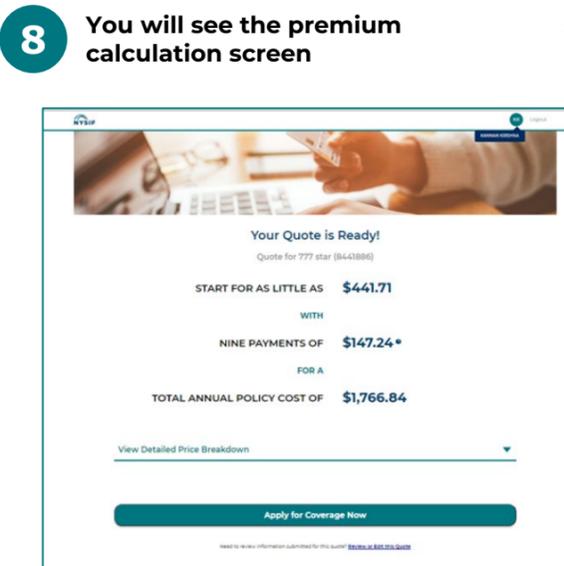
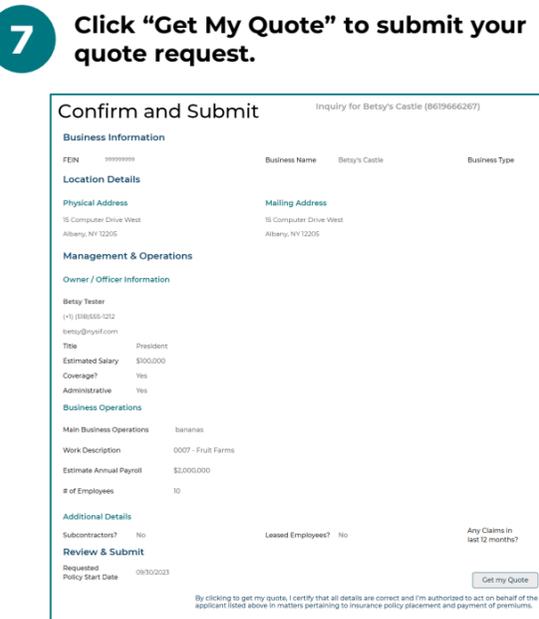
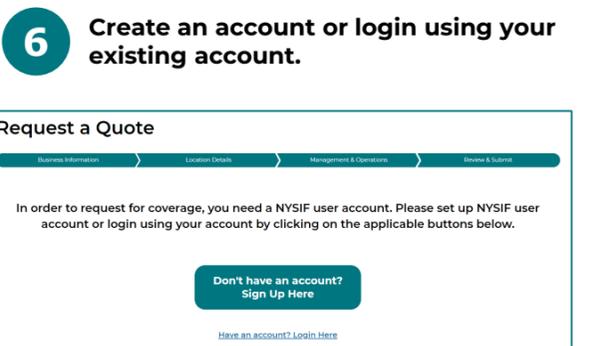
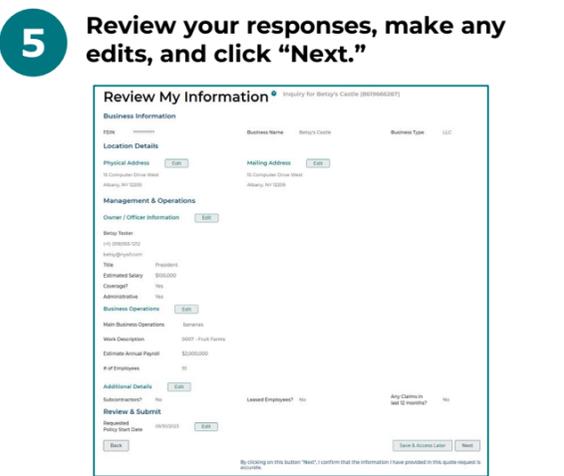
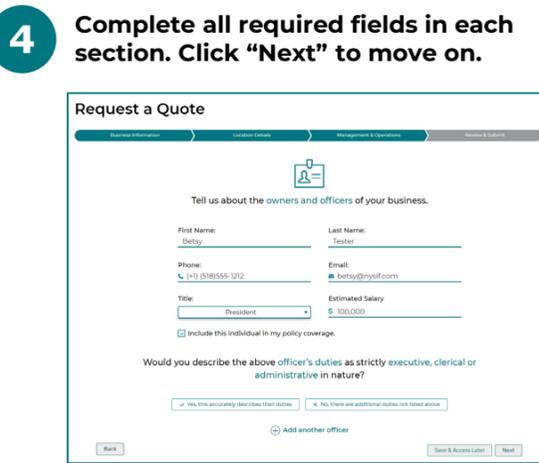
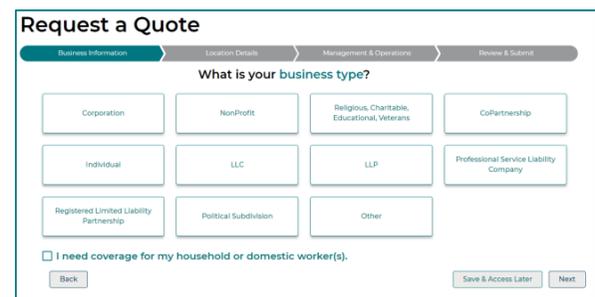
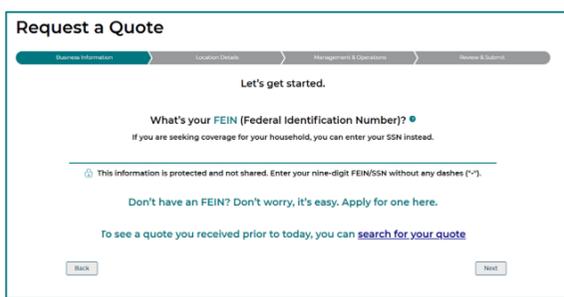
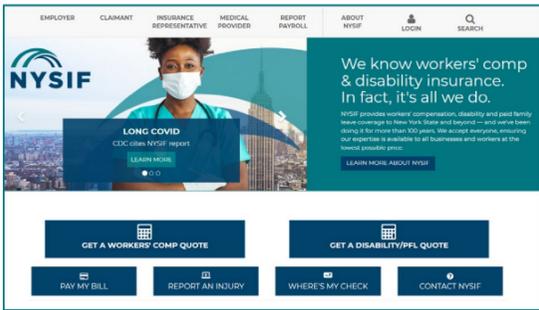
- Business Name, FEIN, Business Type, and Additional Entities / Subsidiaries (if any)
- Mailing Address, Physical Location, and Additional NY Locations (If any)
- Ownership, Payroll & Class Code Information, Claims History, and Requested Policy Start Date

If you are seeking coverage for your household workers...

- Household Name, SSN
- Mailing Address, Physical Location and Additional NY Locations (if any)
- Household Worker Type and Information, Requested Policy Start Date

Key Steps:

- 1 Navigate to the NYSIF website & click on "Get a Workers' Comp Quote."**
 - 2 Enter your FEIN or SSN and click "Next."**
 - 3 Select your Business Type or check the box for household workers**
 - 4 Complete all required fields in each section. Click "Next" to move on.**
 - 5 Review your responses, make any edits, and click "Next."**
 - 6 Create an account or login using your existing account.**
 - 7 Click "Get My Quote" to submit your quote request.**
 - 8 You will see the premium calculation screen**
- OR**
- You will see the pending NYSIF review screen.**



If you have requested a workers' compensation or domestic workers' policy before, we may pre-populate some information. Use the "Yes" or "No" button to confirm and/or edit any applicable pre-populated data. Click "Save & Access Later" and provide email address to save your quote request progress. You will receive a unique link via email. Open the link to resume completing and submitting your quote request.

Have a Question?



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Quick Reference Guide – How to Apply for Coverage

Overview

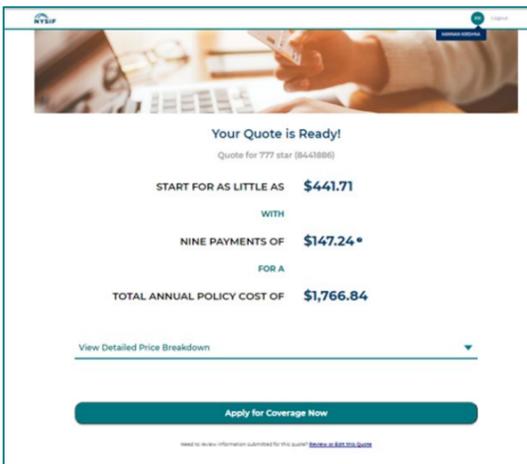
Once you have submitted your quote request and your pricing details have been calculated, you will receive an email with a unique link to access your quote information. To apply for coverage, log into your account to complete your application.

What will I need?

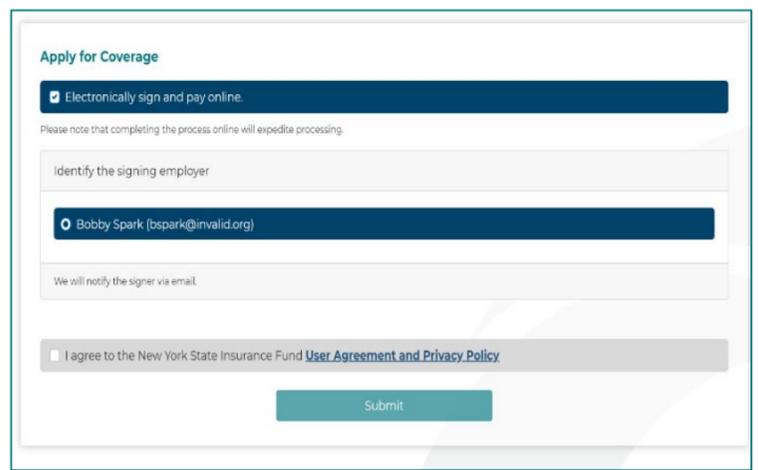
-  “Your Quote is Ready” email from NYSIF with unique link to access quote and premium calculation, and business zip code
-  NYSIF user account login credentials used when submitting the quote request
-  Authority to e-sign the application and a valid bank account or credit card to pay the deposit

Key Steps:

1 Click the link in the email and log in. Click on “Apply for Coverage Now” on the premium calculation screen.



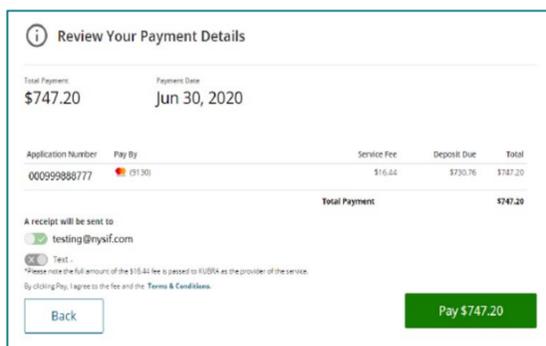
2 Select the designated business personnel to e-sign application. You will then be directed to DocuSign for e-signature.



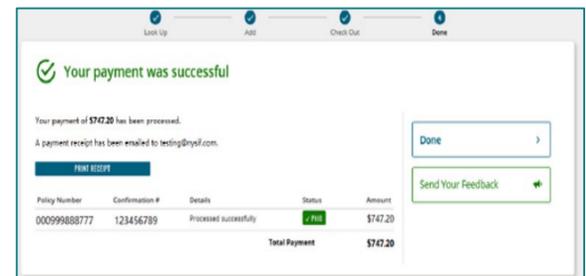
3 Sign, and save a copy for your files. You will be directed to our payment vendor for your deposit payment.



4 Provide and review all payment details to complete payment



5 You will see a “Success” message as confirmation of your payment



To apply for coverage, your quote must be issued within the last 60 days. You can submit a new quote by copying and editing responses on a previously issued quote from the premium calculation page or by initiating a new quote request (navigate to the NYSIF website and click on “Get a Quote”).

To retrieve an existing quote, use “Search for my Quote,” located on the first page of the quote request. Enter the email address provided on the existing quote. If a match is found, your quote email will be resent to that address.

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Quick Reference Guide – How to Cancel/Reinstate My Policy

Overview

If you no longer need coverage from NYSIF, you can initiate a policy cancellation from the portal. Portal notifications and policy status help you track your cancellation progress. If you change your mind about cancellation, you can easily reinstate your policy. If your policy is canceled due to non-payment or if more than five days passed from your cancellation effective date, you will need to contact your policy representative to discuss your reinstatement.

Key Steps – To Cancel Your Policy:

1 Click “My Policy” in the top menu or your policy number on the home page

2 Click “No longer need coverage or need to switch” on Policy Detail page.

3 Click on “Okay, Start My Cancellation” or click on hyperlink to Cancel policy

4 Provide requested information and click “Submit” to complete

5 You will see a “Success” screen as confirmation of your submission

6 After your request is processed, you will see your policy status update to “Pending Cancellation”

Key Steps – To Reinstate your Policy:

1 Click on “Reinstate My Policy” on the Policy Detail Page.

2 You will see a “Success” screen as confirmation of your request.

3 After your reinstatement request is processed, you will see your policy status update to “Active”

Your policy status will be updated to “Pending Cancellation” after your request is processed and the effective cancellation date has been validated. Your policy status will show as “Cancelled” once the effective date has been reached.

Your requested effective cancellation date **may not be** determined as the final effective date.



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