

ASSISTOR AGENCY SUPERVISOR TRAINING

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Today's Presentation



Presenter

Alicia Neznok

Child Health Plus and Marketplace Consumer Assistance Group
Assistor Support Unit

Agenda

The Assistor Agency Supervisor Training will include:

1. Assistor Certification Training, Registration, and Recertification
2. Dashboard Management and the AOM Role
3. Contact Information and Staff Changes
4. Monitoring and Reports
5. Outreach, Customer Service, and Additional Resources

Agenda



Assistor Certification Training, Registration, and Recertification

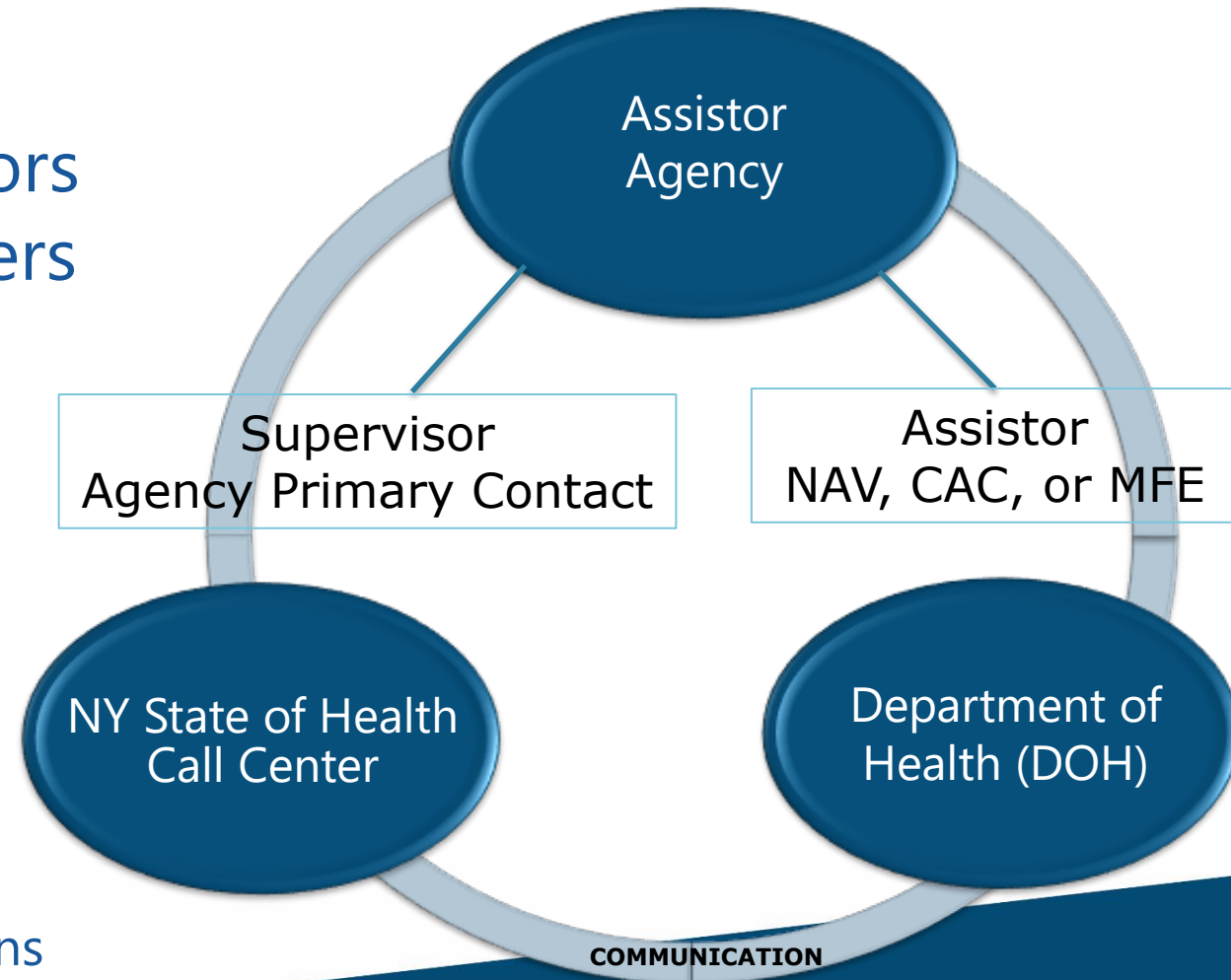
Assistor Certification Training, Registration, and Recertification

Types of Assistors:

- Certified Application Counselors
- Marketplace Facilitated Enrollers
- Navigators

Types of Agencies:

- Hospitals
- FQHCs
- Healthcare Providers
- LDSS
- Government Agencies
- Health Plans
- Community Based Organizations



Assistor Certification Training, Registration, and Recertification



Assistors will complete the **Online Assistor Certification Training** by going to: <https://www.nytrainingservices.com/healthassistors>

- Download and complete the Access Request Form for Assistors.
- Follow the instructions on that form to submit the registration to our training vendor.

If you need additional assistance registering, please email the Registration Mailbox at RegistrationTSP@maximus.com. This mailbox should be used for all initial registration issues, submission of the Access Request Form and any correspondence relating to the initial Certification Training.

Assistor Certification Training, Registration, and Recertification



Assistor completes **Assistor Certification Training**

5-7 Business Days

NY State of Health sends the assistor their **invitation code**.

NYS Department of Health sends the assistor the **instructions for registering** their account and their **agency's contract ID**.

Less than 60 days

The assistor creates their **NY.gov username** and sets up their **assistor account**. The assistor receives their **account number** and **certification number**.

Assistor Certification Training, Registration, and Recertification



Resources for **Assistor Account Creation**

Step by Step User Guides:

- Creating Your NY.gov:

<https://info.nystateofhealth.ny.gov/sites/default/files/NYSOH%20Assistors%20%20Creating%20Your%20NY.gov.pdf>

- Registering your assistor account:

<https://info.nystateofhealth.ny.gov/sites/default/files/NYSOH%20Assistors%20%20Registering%20Your%20Account.pdf>

If your assistors need assistance creating their assistor account, please email the Assistor Admin Mailbox at Assistor.Admin@health.ny.gov.

Assistor Certification Training, Registration, and Recertification



Assistor Account Creation and Identity Proofing

- All assistors must go through the identity proofing process in order to create an account.
- If an Assistor is unable to complete electronic Identity Proofing, an assistor must provide documentation.
- The ID Proofing fax number for assistors is **(518) 486-6282**.
- Submission must include:
 - A fax cover sheet
 - Appropriate documents to prove identity
- DOH will process their documents and send an email confirming that they can move forward with the registration process.

ASSISTOR Identity Proofing Fax Cover Sheet

TO: OFFICE OF HEALTH INSURANCE PROGRAMS (OHIP)	FROM (NAME OF ASSISTOR): _____
OHIP FAX NUMBER: (518) 486-6282	ASSISTOR FAX NUMBER: _____
ASSISTOR PHONE #:	TOTAL # OF PAGES: _____
AGENCY NAME: _____	DATE OF FAX: _____
NOTES: _____	RE: ASSISTOR IDENTITY PROOFING

Two from List A **OR** **One from List A**
AND
Two from List B

List A	List B
• U.S. Passport book or card	• Birth certificate
• Driver's license	• Social Security card
• Official Government Identification card	• Marriage certificate
• School Identification card	• Divorce decree
• U.S. military card or draft record	• Employer Identification card
• Military dependent's Identification card	• High school diploma
• Native American Tribal Document	• College diploma
• U.S. Coast Guard Merchant Mariner card	• High school equivalency diploma
• Certificate of Naturalization (N-550 or N-570)	• Property deed or title
• Certificate of U.S. Citizenship (N-560 or N-581)	

Assistor Certification Training, Registration, and Recertification



RECERTIFICATION PROCESS

- DOH will host a series of Recertification Webinars (usually May – October) each year.
- Assistors are required to view ALL webinars to recertify.
- Keep track of the date you watch the live webinar or the video.
- The webinar supplements the initial Certification training. New assistors must watch too!
- Recertification webinars are posted here: <https://info.nystateofhealth.ny.gov/SpringTraining>

- When the Recertification series is complete, DOH will send each agency a Recertification Report with a list of their registered assistors. The supervisor will complete the spreadsheet by entering the dates each assistor viewed the webinars.
- The supervisor must attest that the information on the Recertification Report is accurate.
- If there is no response, DOH will remove the agency's assistor's access to NY State of Health.

Assistor Certification Training, Registration, and Recertification



In Summary...

A supervisor of assistors can:

- Help staff register for training
- Help staff understand concepts introduced in the training
- Help staff register their assistor accounts
 - Use more experienced assistors as mentors
- Ensure that their assistors are recertified every year

Agenda



Dashboard Management and the AOM Role

Dashboard Management and AOM Role



Assistor Dashboard

- **Overview**
 - Messages and Notices
 - Individual Marketplace Overview (Sub Tabs of accounts that need attention)
- **My Profile**
- **My Clients**
 - Add New Consumers
 - Manage Existing Consumers
- **My Inbox**
- **Address History**
- **Useful Links**

Dashboard Management and AOM



Assistor Oversight Manager (AOM) will help your agency better manage the work of your assistors. The AOM will have a read-only view of their assistor's dashboard. The AOM must be a registered Assistor and will complete the annual recertification process.

AOM Role Assignment

- Supervisors should know who will have the AOM Role at your agency.
- There are two types of managers:
 - Primary AOM will have access to the dashboards of ALL assistors at the agency
 - Secondary AOM will only have access the assistors they supervise. Depending upon the structure of your assistor program, you may want to have multiple secondary AOMs.

Dashboard Management and AOM



Assistor Oversight Manager (AOM) will use the Health Commerce System

- Files/Reports are distributed to the AOM using the Health Commerce System (HCS)
- If your agency has an HCS account, the HCS Coordinator can use a paperless process to add new HCS users. If you do not know your HCS Coordinator, please call the Commerce Accounts Management Unit (CAMU) at 1-866-529-1890 option 1 (M-F 8am-4:45pm). Supervisors can also request the "HCS New Agency" form.
- The AOM Assignment Form must be complete and include both the supervisor's assistor AC# and their HCS username. The AOM Role will not be linked to your dashboard unless this information is complete.
- If you need help completing these forms, send an email to: Assistor.Admin@health.ny.gov. Please include your phone number so that we can speak to you directly.

Dashboard Management and AOM Role



Training for the AOM Role

- All Supervisors who have the AOM Role must be trained.
- Supervisors will be sent a link to the AOM training and must attest that they watched the training video.
- Remember: The AOM will be able to search for “My Assistors” and “My Assistors’ Clients” and generate reports

Dashboard Management and AOM



Reports for the AOM

Supervisors will be able to create the following reports for a single assistor or a group of assistors.

The reports are Excel files and can be sorted and filtered.

Reports are stored securely on the HCS.

AOM REPORT NAME	KEY REPORT TOPICS
Client Eligibility by Program Type	Program Type by Client Eligibility Start and End Dates Select 1-2 Assistors Member Details
Documentation Clocks	Encourage Follow-Up with Clients Income and Immigration Documents Program Type for each Member
List of Account Holders	Accounts on Dashboard Address of Consumer Last Activity Date Assigned AOM
Number Eligible and Enrolled	Eligibility by Program Enrolled by Program Type Eligibility Start and End Dates
Profile Details	Profile Accuracy # of Assistors Staff Changes Address, Counties Served, Languages
Renewal Status	Renewal Cycle # of Accounts Due to Renew
Total Count by Application Status	Compare Assistor Productivity # of Active and Inactive Accounts # Due to Renew or Document
Weekly Activity	Compare Activity by Week # Added or Removed from Dashboard # of Life Status Changes

Agenda



Contact Information and Staff Changes

Contact Information and Staff Changes



How can DOH support my Assistors and Program Managers?

- Updating Contact Information Forms
- Report Staff Changes

Contact Information and Staff Changes



- Assistor agencies should update their contact information throughout the year as changes occur
- Annual **Contact Information** Review
 - Primary Contacts, addresses, and service area should be reviewed and sent back to Assistor.Admin@health.ny.gov.

Contact Information and Staff Changes



Reporting Staff Changes

- **Any changes in assistor staffing at your agency must be reported within 48 business hours of the change to Assistor.Admin@health.ny.gov.**
 - Must include:
 - Sufficient information to identify the assistor
 - Effective Date
 - Name of another assistor to transfer accounts to or indicate unassign

DO NOT wait until Recertification to report that someone is no longer functioning as an assistor!

Agenda



Monitoring and Reports

Monitoring and Reports

How can a supervisor be prepared to monitor their Assistors?

- Dashboard Management and AOM Role
- Facilitate Staff Meetings
- Account Review – Look for Trends by Category

Monitoring and Reports

What happens when a Supervisor needs more help?

- Account Review Template – Encrypted Spreadsheet
 - <https://info.nystateofhealth.ny.gov/news/assistor-training-account-review-template>
 - Submitting Cases to DOH
 - Receiving Responses to Cases
 - Receiving Reports of Assistor Errors and Complaints Regarding Assistor Customer Service

Monitoring and Reports

DOH Reports Sent to Agency Supervisors

Productivity and Enrollment Reports

Provides eligibility and enrollment activity associated with your agency's assistors

Lists of Accounts that need Outreach/Review

These spreadsheets are designed to give you information about clients on your assistor's dashboard. The spreadsheet should be separated by assistors and may need your response.

Assistor Newsletter, Other Updates via Email

Monitoring and Reports

Monitoring Privacy and Security

- Assistors are required by law, to protect Personally Identifiable Information (PII) and Protected Health Information (PHI). The Assistor Agency must report any breaches of PII/PHI to NYSOHSecurity@health.ny.gov within 24 hours.

Agenda



Outreach, Customer Service and Additional Resources

Outreach, Customer Service, and Additional Resources



Outreach Events

- Review your Agency's Contact Information Form:
 - Checkbox for public events
 - Counties for public events
- NY State of Health Events Map and Events Submission
 - Online form for assistors to submit events for the Events Map
<https://www.surveymonkey.com/r/NYSOHCalendarEvents>
 - Events Map: <https://info.nystateofhealth.ny.gov/events>
- Social Media Training Webinar: <https://info.nystateofhealth.ny.gov/news/assistor-training-social-media>
- Outreach Tool Kit: <https://info.nystateofhealth.ny.gov/outreacht toolkit>
- Unwinding from the Public Health Emergency (PHE) Tool Kit: <https://info.nystateofhealth.ny.gov/PHE-tool-kit>

Outreach, Customer Service, and Additional Resources



Customer Service Tips

How can my assistor have a successful appointment?

- Give consumers a brief overview of the application process
- Tell the consumer what they need to bring to the appointment
- Obtain information about people applying and living in their household
 - Demographic details: names, date of birth, social security numbers, income for all household members, immigration document numbers, information regarding any other health insurance that they have or will have access to

Outreach, Customer Service, and Additional Resources



Customer Service Tips

It is a good idea to have the consumer authorize you as their assistor prior to their appointment

If the consumer has an account, they can authorize their assistor:

- On their own, by logging into their individual account with their NY.gov username and password
- With the help of the call center

If the consumer is unable to authorize the assistor before the appointment, the assistor will need to call the marketplace with the consumer to authorize the assistor.

If the consumer does not have an account, an assistor can help them create a new account.

Outreach, Customer Service, and Additional Resources



Customer Service Tips Speaking to the Call Center

- The level of assistance a Customer Service Specialist (CSS) at the call center may provide to an Assistor depends on:
 - Whether the assistor is authorized to speak on behalf of the consumer
 - Whether the consumer is present (either in person or on the phone) with the Assistor at the time of the call
- Authenticating
- Authorizing

Outreach, Customer Service, and Additional Resources



Customer Service Tips

Post Enrollment Assistance

- Make sure consumers enroll... and stay enrolled
 - Contact Information
- Documents to Confirm Eligibility
 - Income Documents
 - Immigration Status
- Follow Up Appointments

Outreach, Customer Service, and Additional Resources



Assistor Resources

- Websites

- Assistor Tool Kit

- <https://info.nystateofhealth.ny.gov/assistor toolkit>

- Spring Training Webinars

- <https://info.nystateofhealth.ny.gov/SpringTraining>

- Additional Webinars

- <https://info.nystateofhealth.ny.gov/webinars>

Outreach, Customer Service, and Additional Resources



All Assistors

Assistor training questions: Eligibility.Training.Support@health.ny.gov

If you have a case specific question, the issue should be sent on an encrypted Account Review Spreadsheet to: Assistor.Cases@health.ny.gov

If your assistors need help with their Assistor Account or Oversight Manager Account, or if your agency needs to report staff changes, please send an email to: Assistor.Admin@health.ny.gov: Assistor.Admin@health.ny.gov

Navigators Only

•When Navigator Agencies are submitting contract documents (vouchers, annual packet documents, progress reports, site schedules, etc.) and related questions, please send them to:

Navigator.Admin@health.ny.gov and CC your Navigator Contract Manager

•When Navigator Agencies are submitting media approval requests, educational and marketing material approval requests, and consumer story submissions, please send them to:

Navigator.Media@health.ny.gov and CC your Navigator Contract Manager

Outreach, Customer Service, and Additional Resources

NY State of Health - Call Center Information



Call Center – General Questions

<u>General Customer Service</u>	<u>1-855-355-5777</u>
<u>General Fax</u>	<u>1-855-900-5777</u>
<u>Assistor "Quick Calls" Line</u>	<u>1-866-834-6979</u>

Consumer Identity Proofing

<u>ID Proofing Fax</u>	<u>1-518-560-5102</u>
<u>ID Proofing Telephone Follow Up</u>	<u>1-855-357-8450</u>

1095-A & 1095-B Dedicated Line

<u>Customer Service Line</u>	<u>1-855-766-7860</u>
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Summary

- After the assistor successfully completes the initial certification training – assistors have 60 days to register
- Agencies will respond timely to recertification and other outreach requests
- Supervisors must confirm that the annual recertification information about each assistor is complete

- Supervisors should meet regularly with assistors to discuss their dashboard
- Agencies will determine who should have the AOM Role

- Agencies must report staff changes within 48 business hours of such change
- Supervisors will maintain accurate contact information

- Agency reports about assistors will provide supervisors with better oversight of the assistor's productivity
- Agencies must report any breaches of PII or PHI within 24 hours of the incident

- Supervisors should meet regularly with Assistors to discuss ways to improve customer service
- Remember: Communication is the key to a successful assistor program

Thank you for participating in this training!



As a requirement for Assistor Recertification, every primary contact at an Assistor Agency must view this training. If you have questions about this training, please send them to Assistor.Admin@health.ny.gov.