

Date: April 26, 2023

Time: 10:00am – 12:00pm



UNWINDING FROM CONTINUOUS COVERAGE REQUIREMENTS IN NY STATE OF HEALTH PART 2

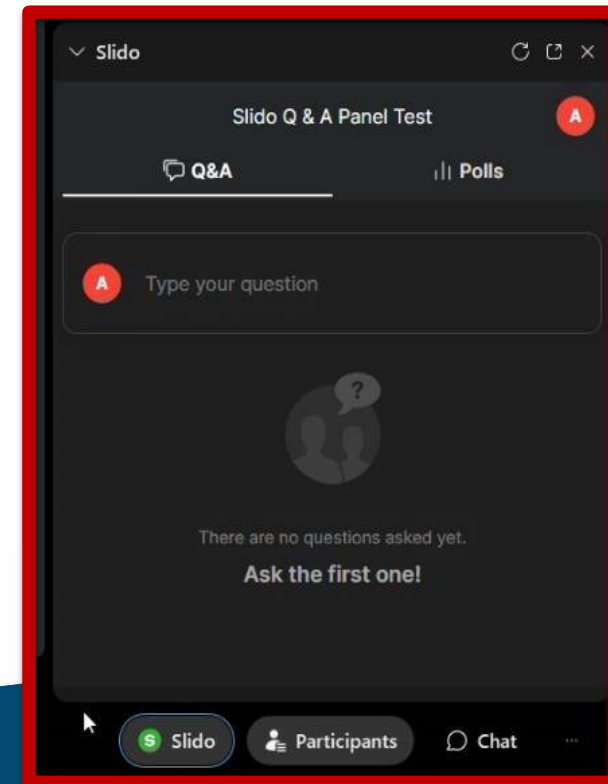
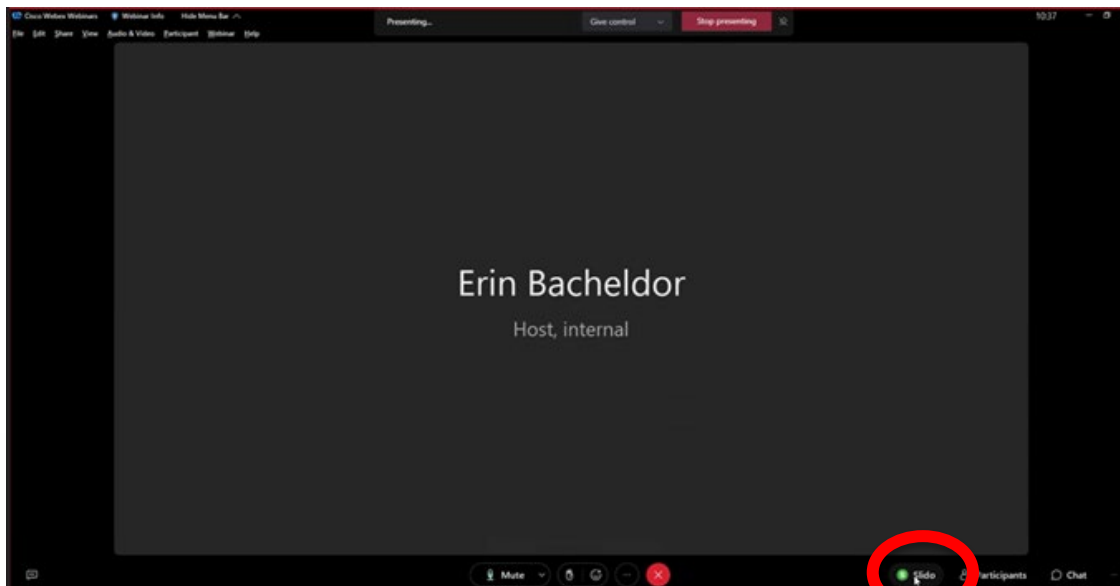
Log into the WebEx first: click [HERE](#)

Then, you may connect to audio via computer audio or via telephone audio

QUESTIONS

Questions can be submitted using the Slido Q&A function on your WebEx control panel.

- Chat function is disabled, please use the Slido Q & A panel to submit questions.
- We will pause periodically to take questions.



RECORDING AND MATERIALS

A recording of the webinar and any related materials will be posted.

Watch your email for this notification.

<https://info.nystateofhealth.ny.gov/SpringTraining2023>



nystateofhealth | SUPPORT & RESOURCES
The Official Health Plan Marketplace

Individuals & Families | Employers | Assistors & Brokers | Info & Events

Home » 2023 Spring Training

2023 Spring Training

April 19, 2023



Session	Topic	Training Materials
1 April 19, 2023	Unwinding from Continuous Coverage Requirements in NY State of Health, Part 1 - An overview of the unwind process and timelines as well as a refresher on provisions that will be reinstated, such as documentation requirements	Presentation Video

TODAY'S WEBINAR



Director

Gabrielle Armenia

Director, Bureau of Child Health Plus and Marketplace Consumer Assistance

Panelists

Marci Goldstein

Director, Division of Communications for the Office of Health Insurance Programs and NY State of Health

Alicia Neznok

Medical Assistance Specialist 3, Bureau of Child Health Plus and Marketplace Consumer Assistance

Sara Oberst

Director, Bureau of Exchange Application Support

Kelvin Sapp

Deputy Director, Communications, Marketing and Outreach, NY State of Health

Lisa Sbrana

Director, Division of Eligibility and Marketplace Integration

TODAY'S AGENDA

- Communications
- Marketing & Media
- Consumer Contact information and Undeliverable Mail
- Dashboard Tools for Assistors
- Resources for Assistors

NY State of Health Marketing and Outreach

MARKETING AND OUTREACH

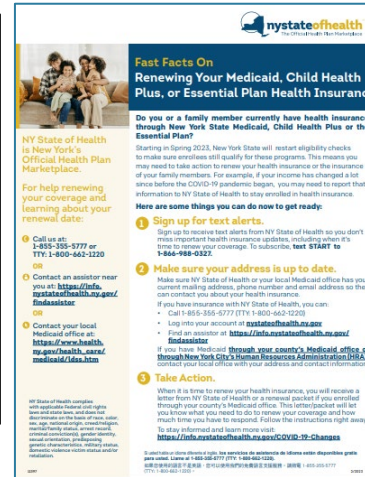
<https://info.nystateofhealth.ny.gov/COVID-19-Changes>



Important Changes to New York Medicaid, Child Health Plus and the Essential Plan

Do you or a family member currently have health insurance through New York State Medicaid, Child Health Plus or the Essential Plan? Starting in Spring 2023, New York State will resume eligibility reviews and renewals for people enrolled in these programs. This means you may need to take action to renew your health insurance or the insurance of your family members. Read the following resources to learn more.

- For New Yorkers enrolled through NY State of Health:
 - Frequently Asked Questions
 - Learn about the steps to renew your insurance



Fast Facts On Renewing Your Medicaid, Child Health Plus, or Essential Plan Health Insurance

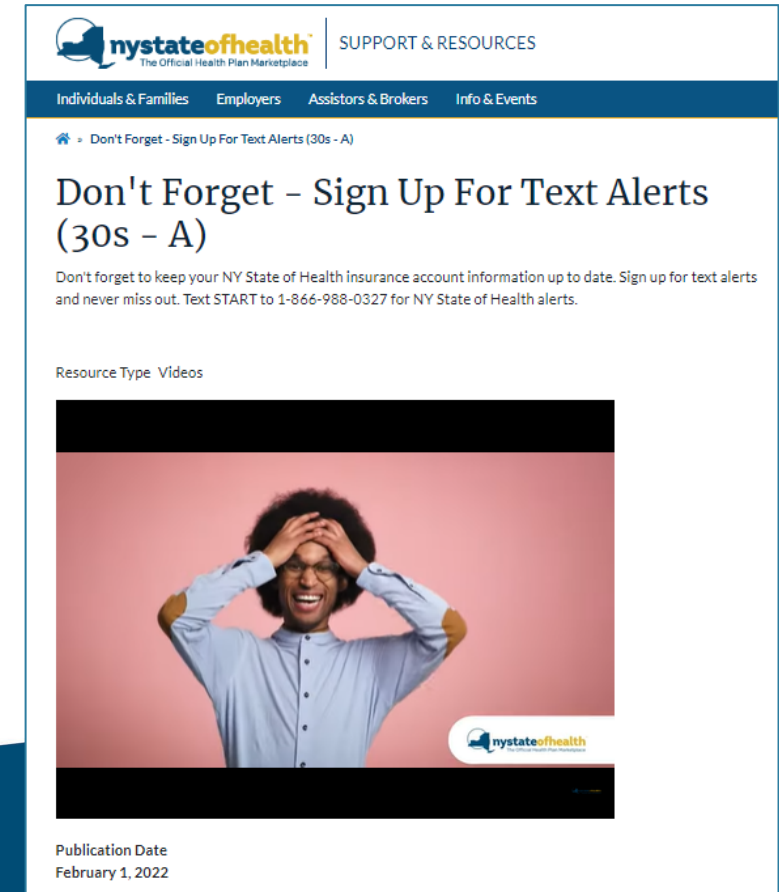
Do you or a family member currently have health insurance through New York State Medicaid, Child Health Plus or the Essential Plan?

Starting in Spring 2023, New York State will restart eligibility checks to make sure enrollees still qualify for these programs. This means you may need to take action to renew your health insurance or the insurance of your family members. For example, if your income has changed a lot since before the COVID-19 pandemic began, you may need to report that information to NY State of Health to stay enrolled in health insurance.

Here are some things you can do now to get ready:

- Sign up for text alerts.** Sign up to receive text alerts from NY State of Health so you don't miss important health insurance updates, including when it's time to renew your coverage. To subscribe, text **START** to 1-866-988-0327.
- Make sure your address is up to date.** Make sure NY State of Health or your local Medicaid office has your current mailing address, phone number and email address so they can contact you about your health insurance.
 - If you have insurance with NY State of Health, you can:
 - Call 1-866-988-0327 (TTY: 1-800-662-1220)
 - Log into your account at nystateofhealth.ny.gov
 - Find an assessor at <https://info.nystateofhealth.ny.gov/>
 - If you have Medicaid through your county's Medicaid office or through New York State's Human Resources Administration (HRA), contact your local office with your address and contact information.
- Take Action.** When it is time to renew your health insurance, you will receive a letter from NY State of Health or a renewal packet if you enrolled through your county's Medicaid office. This letter/packet will let you know what you need to do to renew your coverage and how much time you have to respond. Follow the instructions right away. To stay informed and learn more visit <https://info.nystateofhealth.ny.gov/COVID-19-Changes>

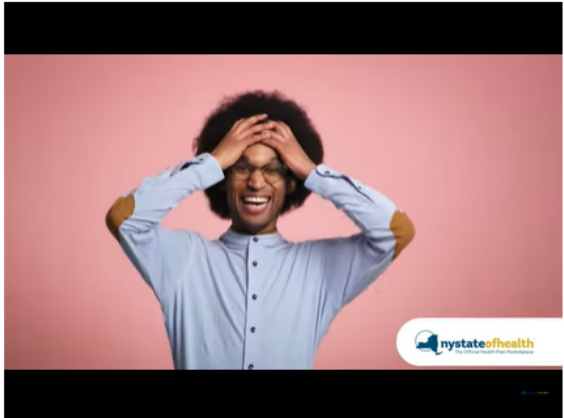
NY State of Health Videos



Don't Forget - Sign Up For Text Alerts (30s - A)

Don't forget to keep your NY State of Health insurance account information up to date. Sign up for text alerts and never miss out. Text **START** to 1-866-988-0327 for NY State of Health alerts.

Resource Type Videos



Publication Date
February 1, 2022

Unwinding from the COVID-19 Public Health Emergency: A Communications Tool Kit to Keep New Yorkers Covered

Overview

Important changes are coming. New federal rules will require New York State to begin redetermining eligibility for public program enrollees in the Spring of 2023. Enrollees in Medicaid, Child Health Plus (CHP) and the Essential Plan (EP) have not had to renew their health insurance since early 2020 due to the COVID-19 public health emergency (PHE) continuous coverage requirements for these public programs, which were adopted by the Families First Coronavirus Response Act in March 2020. However, the December 2022 Consolidated

<https://info.nystateofhealth.ny.gov/PHE-tool-kit>

In an effort to minimize the number of New Yorkers at risk of losing their Medicaid, CHP or EP coverage, New York State is working with partners, local districts and other stakeholders to inform New Yorkers about renewing their coverage and exploring other available health insurance options if they no longer qualify for Medicaid, CHP or EP.

Phase 1: Prepare for the renewal process and educate Medicaid, CHP and EP enrollees about the upcoming changes and the importance of opting in for text messages from NY State of Health so they'll know when it is time to renew their coverage.



Forgetting something?
Don't forget to sign up for text alerts from NY State of Health so you'll know when it's time to renew your insurance!
Text START to 1-866-988-0327

¿Se olvidó algo?
¿Se olvidó registrarse para recibir alertas de texto de NY State of Health para saber cuándo renovar su seguro?
Envíe el texto START al 1-866-988-0327

遺漏了什麼?
別忘了註冊接收來自 NY State of Health 的簡訊提醒，以瞭解您的保險何時到期。
請發送 START 到 1-866-988-0327

COMMUNICATIONS OVERVIEW

The NYS Department of Health (DOH) has made available several outreach and marketing resources to help inform New Yorkers enrolled in Medicaid, Child Health Plus (CHPlus) or the Essential Plan (EP) about the important steps they need to take to renew their coverage and help promote these messages.

Outreach has included a robust public education campaign, paid advertising, option to receive text notifications about renewals, direct mailings and other communications tools for partners.

Additionally, DOH is working closely with Local Departments of Social Services statewide, the Human Resources Administration (HRA) in New York City and the NYC Dept. Of Health & Mental Hygiene, Mayor's Public Engagement Unit. This includes sharing and co-branding educational materials, videos and digital assets to support districts and HRA in their efforts to keep consumers covered.

PUBLIC EDUCATION CAMPAIGN

- The Public Education Campaign reminds enrollees about what is needed to renew their health insurance coverage and maximize the potential for auto-renewal.
- The campaign's webpage (<https://info.nystateofhealth.ny.gov/COVID-19-Changes>) explains the changes that are coming and lists steps enrollees can take now to prepare (e.g., sign up for text alerts and update their contact information).
- Information on this webpage is available in the following languages:
 - English
 - Spanish
 - Simplified Chinese
 - Traditional Chinese
 - Arabic
 - Bengali
 - French
 - Haitian Creole
 - Italian
 - Korean
 - Polish
 - Russian
 - Urdu
 - Yiddish

<https://info.nystateofhealth.ny.gov/COVID-19-Changes>



The screenshot shows the nystateofhealth website. At the top left is the logo with the text 'nystateofhealth The Official Health Plan Marketplace'. To its right is the text 'SUPPORT & RESOURCES'. Further right are two buttons: a yellow 'Get Covered' button and a 'Log In' button with a dropdown arrow. Below this is a dark blue navigation bar with links for 'Individuals & Families', 'Employers', 'Assistors & Brokers', 'Info & Events', and 'Language Support'. The main content area has a breadcrumb trail: 'Home » Important Changes to New York Medicaid, Child Health Plus and the Essential Plan'. The title is 'Important Changes to New York Medicaid, Child Health Plus and the Essential Plan'. The text below reads: 'Do you or a family member currently have health insurance through New York State Medicaid, Child Health Plus or the Essential Plan? Starting in Spring 2023, New York State will resume eligibility reviews and renewals for people enrolled in these programs. This means you may need to take action to renew your health insurance or the insurance of your family members. Read the following resources to learn more.' There are three main bullet points, each with two sub-bullets of links:

- For New Yorkers enrolled through **NY State of Health**:
 - [Frequently Asked Questions](#)
 - [Learn about the steps to renew your insurance](#)
- For New Yorkers enrolled through the **New York City Human Resources Administration (HRA)**:
 - [Frequently Asked Questions](#)
 - [Learn about the steps to renew your insurance](#)
- For New Yorkers enrolled through their **Local Department of Social Services**:
 - [Frequently Asked Questions](#)
 - [Learn about the steps to renew your insurance](#)

Here are some things you can do **now** to get ready.

Information available on the NYS Medicaid website

Department of Health
Individuals/Families Providers/Professionals Health Facilities Health Data About Us Search

Medicaid

- Medicaid Home
- How to Apply
- Information for:
 - Members
 - Providers
- Local Departments of Social Service (LDSS)
- Health Plans
- Managed Care
- Child Health Plus
- Integrated Care for Dual Eligibles
- Medicaid Data and Reports
- Medicaid Update
- Medicaid Redesign Team (MRT)
- Medicaid Finance and Rate Setting
- Archive

You are Here: [Home Page](#) > [New York State Medicaid](#) > Important Changes to New York Medicaid, Child Health Plus and the Essential Plan

Important Changes to New York Medicaid, Child Health Plus and the Essential Plan

Do you or a family member currently have health insurance through New York State Medicaid, Child Health Plus or the Essential Plan?

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Read the following resources to learn more.

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 - [Frequently Asked Questions](#)
 - [Learn about the steps to renew your insurance](#)
- For New Yorkers enrolled through the New York City Human Resources Administration (HRA):
 - [Frequently Asked Questions](#)
 - [Learn about the steps to renew your insurance](#)
- For New Yorkers enrolled through their Local Department of Social Services:
 - [Frequently Asked Questions](#)
 - [Learn about the steps to renew your insurance](#)

Here are some things you can do **now** to get ready.

1) Make sure your address is up to date

If you enrolled through NY State of Health, make sure NY State of Health has your current mailing address, phone number and email address so they can contact you about your health insurance. To update your information:

- Call NY State of Health at 1-855-355-5777 (TTY: 1-800-662-1220)

Follow NYS Medicaid





Questions

HOW DO I APPLY FOR MEDICAID?

You can apply for Medicaid in any one

PUBLIC EDUCATION CAMPAIGN: GROUND GAME

- **Partnerships**

- Leverage existing and new partnerships to enhance NY State of Health's capacity and reach
- Empower trusted community partners to tailor their outreach approaches to disseminate information about the actions consumers need to take to maintain continuous coverage

- **Spread the Message**

- Identify community events (e.g., festivals, health fair, popup markets) and venues (e.g., bodegas, food pantries, libraries) for NY State of Health and our partners to attend and share materials with public program enrollees

- **Learn**

- Utilize materials and the Public Health Emergency (PHE) Communications Tool Kit

PUBLIC EDUCATION CAMPAIGN: PARTNER ENGAGEMENT

Encourage partner organizations to:

1. Share NY State of Health education materials with your community

- Share NY State of Health educational materials
- Consider “co-branding” materials with NY State of Health and your organization
- Share NY State of Health social media posts
- Include this information in emails to consumers you work with
- Highlight this issue in media interviews

2. Stay in touch with us

- Check the NY State of Health website for regular updates on PHE-related information
- We welcome your feedback and would be happy to meet with your groups

PAID ADVERTISING. THREE PHASES

Phase	Timing	Goals
1	2022	Prepare for the renewal process and educate Medicaid, CHPlus and EP enrollees about the upcoming changes and the importance of opting in for text messages from NY State of Health so they'll know when it is time to renew their coverage.
2	2022-2023	Encourage enrollees to update their address and contact information to ensure the renewal notices will reach them.
3	2023-2024	Ensure enrollees take the necessary steps to renew coverage and transition to other coverage if they are no longer eligible for Medicaid, CHPlus or EP.

PHASE ONE

Urges Enrollees to Sign Up for Text Alerts and “STAY CONNECTED”

¿Se olvida de algo?

¡No olvide registrarse para recibir alertas de texto de NY State of Health para saber cuándo renovar su seguro!

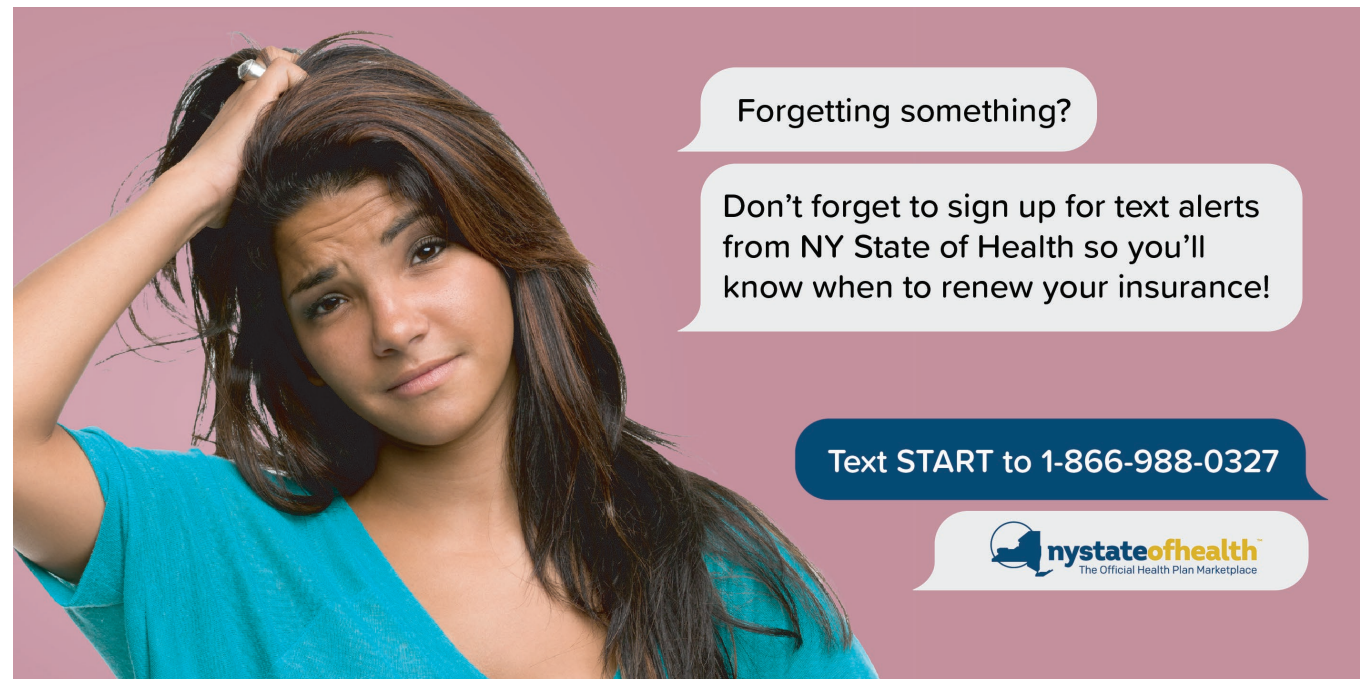
Textear la palabra INICIAR al 1-866-988-0327



Forgetting something?

Don't forget to sign up for text alerts from NY State of Health so you'll know when to renew your insurance!


Text START to 1-866-988-0327



Forgetting something?

Don't forget to sign up for text alerts from NY State of Health so you'll know when to renew your insurance!

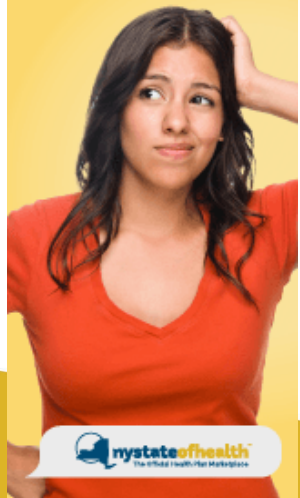
Text START to 1-866-988-0327



是否遺忘了什麼？

別忘了註冊以接收來自 NY State of Health 的簡訊提醒，以瞭解您的保險應何時續期！

編輯簡訊 START 至 1-866-988-0327



PHASE TWO

Reminds Enrollees to "STAY CONNECTED" to Their Health Insurance and Update Their Contact Information

**STAY CONNECTED
TO YOUR HEALTH
INSURANCE.**

UPDATE MY INFO & GET TEXTS



**MANTÉNGASE
CONECTADO CON SU
SEGURO MÉDICO.**

ACTUALIZAR MI INFORMACIÓN Y
RECIBIR MENSAJES DE TEXTO



**與您的健康保險
保持聯絡。**

更新我的資訊並接收簡訊



Informs Enrollees That When They Hear from Us, It's Time to Take Action

- These ads will launch in Spring 2023
- Three different ad concepts will be used to share these key messages:
 1. Their renewal notice is one notification they don't want to miss
 2. Receiving their renewal notice is the signal that it's time for them to renew
 3. We are here to help them complete their renewal

SAMPLE PHASE THREE ADS

**THIS IS ONE
MESSAGE YOU
DON'T WANT
TO IGNORE.**

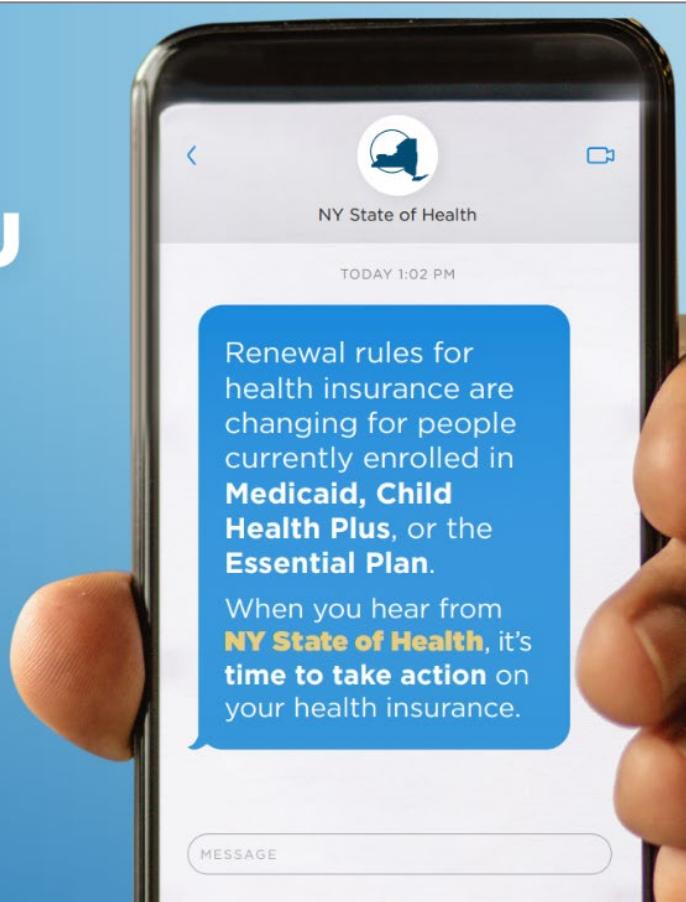
Sign into your account
or call to get started.



nystateofhealth.ny.gov

(855) 355-5777

Print



Social Media



Display

生活充斥著忙碌。
這就是為什麼我們
在此為您的健康保
險提供幫助。



當收到我們的通知時，
就是對您的健康保險
採取行動的時候了。

瞭解更多

PAID ADVERTISING: MEDIA USED

Digital	Print	Television	Out-of-Home	Radio
<ul style="list-style-type: none">• social media• display banner• search• over-the-top• streaming video• streaming audio	<ul style="list-style-type: none">• regional dailies• ethnic publications	<ul style="list-style-type: none">• broadcast• cable	<ul style="list-style-type: none">• transit• place-based (e.g., laundromats)	<ul style="list-style-type: none">• broadcast radio

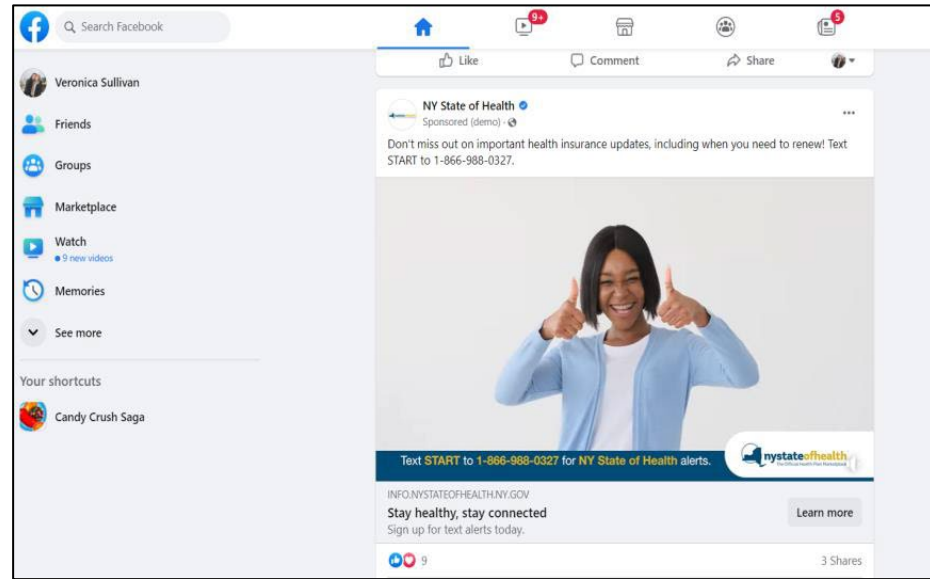
All videos produced for this campaign are available in [this YouTube playlist](#).

DIGITAL AD SAMPLES



與您的健康保險保持聯絡。更新我的資訊並接收簡訊

共同決定 紐約市的未來



Veronica Sullivan

NY State of Health

Don't miss out on important health insurance updates, including when you need to renew! Text START to 1-866-988-0327.

Text START to 1-866-988-0327 for NY State of Health alerts.

Stay healthy, stay connected. Sign up for text alerts today.



Instagram

nystateofhealth Sponsored

是否遺忘了什麼？別忘了註冊以接收來自 NY State of Health 的簡訊提醒，以瞭解您的保險應何時續期！

編輯簡訊 START 至 1-866-988-0327

Learn more

nystateofhealth 我們最近是否聯絡過？保持更新您的 NY State of Health 帳戶資訊，並註冊簡訊更新提醒，以防遺漏更新內容。



Ad · info.nystateofhealth.ny.gov/

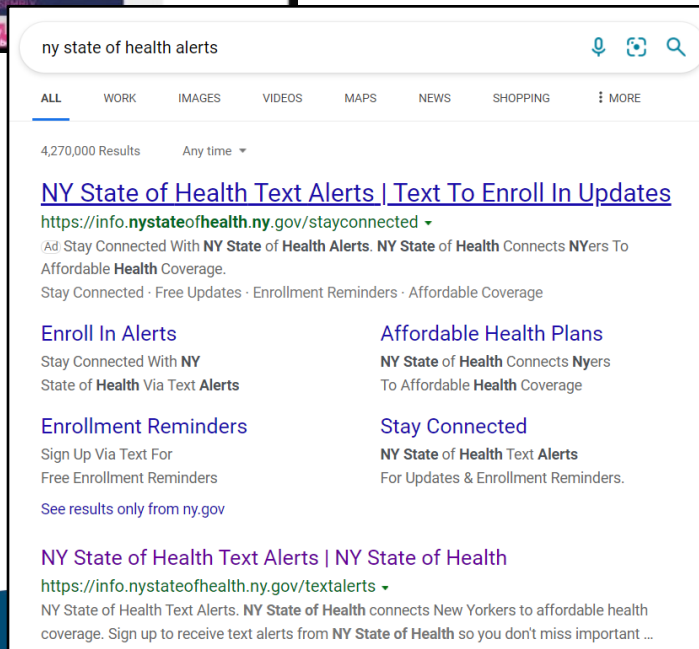
Cobertura Médica Asequible | Manténganse Conectados | Recordatorios De Inscripción

Manténgase Conectado Con Las Alertas De NY State of Health. NY State of Health Conecta A Los Neoyorquinos Con Cobertura Médica Asequible. Actualizaciones Gratis. Cobertura Asequible. Manténgase Conectado.

Inscríbese En Alertas

Manténgase Conectado

Call 1-855-355-5777



ny state of health alerts

ALL WORK IMAGES VIDEOS MAPS NEWS SHOPPING MORE

4,270,000 Results Any time

[NY State of Health Text Alerts | Text To Enroll In Updates](https://info.nystateofhealth.ny.gov/stayconnected)

Ad. Stay Connected With NY State of Health Alerts. NY State of Health Connects NYers To Affordable Health Coverage.

Stay Connected · Free Updates · Enrollment Reminders · Affordable Coverage

Enroll In Alerts	Affordable Health Plans
Stay Connected With NY State of Health Via Text Alerts	NY State of Health Connects NYers To Affordable Health Coverage
Enrollment Reminders	Stay Connected
Sign Up Via Text For Free Enrollment Reminders	NY State of Health Text Alerts For Updates & Enrollment Reminders.
See results only from ny.gov	

[NY State of Health Text Alerts | NY State of Health](https://info.nystateofhealth.ny.gov/textalerts)

NY State of Health Text Alerts. NY State of Health connects New Yorkers to affordable health coverage. Sign up to receive text alerts from NY State of Health so you don't miss important ...



equipos mejora el ambiente y la productividad

Patricia Ramirez 30/10/2022 07:27

Loneto Ruiz-Ocaña 02/11/2022 22:52

MANTÉNGASE CONECTADO CON SU SEGURO MÉDICO.

ACTUALIZAR MI INFORMACIÓN Y RECIBIR MENSAJES DE TEXTO

PAULA ARCOS

Paula Arcos, presente y futuro del balonmano femenino español

Teléfono para IBERDROLA 14/10/2022 10:11

¿Sabías que hay un ingrediente tres veces más potente que el retinol? Este sérum lo lleva y lo mejor es que no irritará tu piel

Teléfono para ISDIN 06/10/2022 10:54

Las mejores anfitrionas de España nos ilustran sobre el arte de recibir en casa

Teléfono para PORCELANOSA 20/10/2022 19:31

PRINT AD SAMPLES

ИЗ ШТАТА В ШТАТ

Что-то забыли?

Не забудьте подписаться на текстовые уведомления от NY State of Health, чтобы продлить страховку вовремя!

Отправьте START на номер 1-866-988-0327

Второе вложение - падение спроса. Здесь, помимо программы льготной авиационной, сократились туристические расходы в разгар COVID-19 на 96%. Достигли тысячи сотрудников были отправлены по домам. Производители одежды и спортивной обуви кризис вынужденной смены

19 занимались последней подготовкой товаров в рестораны по всей стране. Бизнес шел в гору. Иностранцы вкладывали в США миллионы долларов и не видели рисков. Пока компании обдумывали решение о реструктуризации бизнеса и новых доступных типичных ресторанах, все рестораны

Forgetting something?

Don't forget to sign up for text alerts from NY State of Health so you'll know when to renew your insurance!

Text START to 1-866-988-0327

اللواء العربي ALLEWAA ALARABI

من الهموم التي تعيقنا

هل نسيت شيئاً ما؟

لا تنس تسجيل الاشتراك في النصوص القصيرة من NY State of Health لتجدد التأمين الخاص بك في الوقت المناسب.

START على الرقم 1-866-988-0327

কিছু ভুল বামেন?

NY State of Health থেকে টেক্সট আলার্টিগুলি পাবার জন্য মাইন জাম্প করতে ভুলবেন না যাতে আপনি জানতে পারবেন কখন আপনাকে বীমা পুনর্নবীকরণ করতে হবে!

START লিখে 1-866-988-0327 নম্বরে টেক্সট করুন

ক্রাসিফাইড Classified ক্রাসিফাইড

আপনি কি ক্রাসিফাইড বিজ্ঞাপন দেয়ার কথা ভাবছেন?

সাপ্তাহিক বাংলাদেশ দিচ্ছে খিলাফ ছাড়।

১৫ শব্দের ক্রাসিফাইড বিজ্ঞাপন ১ সপ্তাহ ১০ ডলার ও সপ্তাহ ২০ ডলার

ŚNIEG I OBLÓDZENIE TO ŻADNE WYZWANIE DLA NYC

Drzwi • Mosty • Dorożki

1160 Kennedy Blvd., Bayonne, NJ 07002
343 Main Avenue Wallington, NJ 07697
3401 Kennedy Blvd., Jersey City, NJ 07307

invisalign® Braces

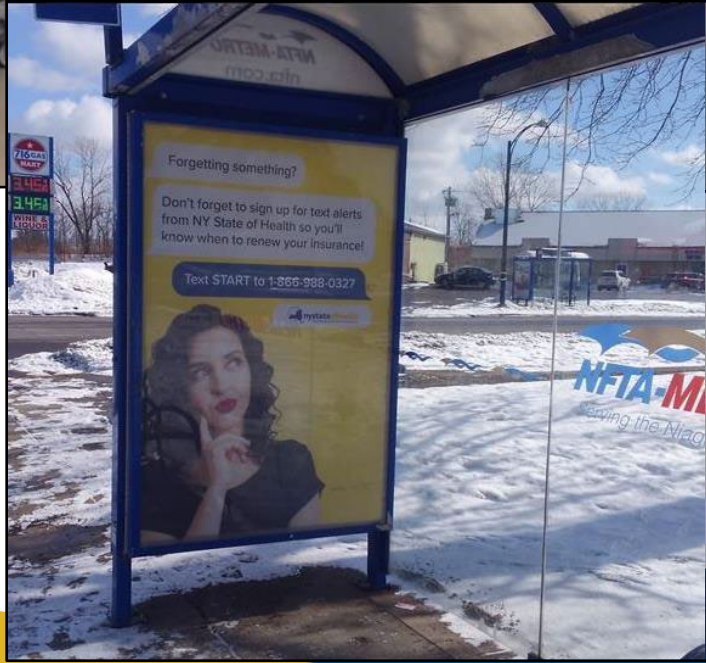
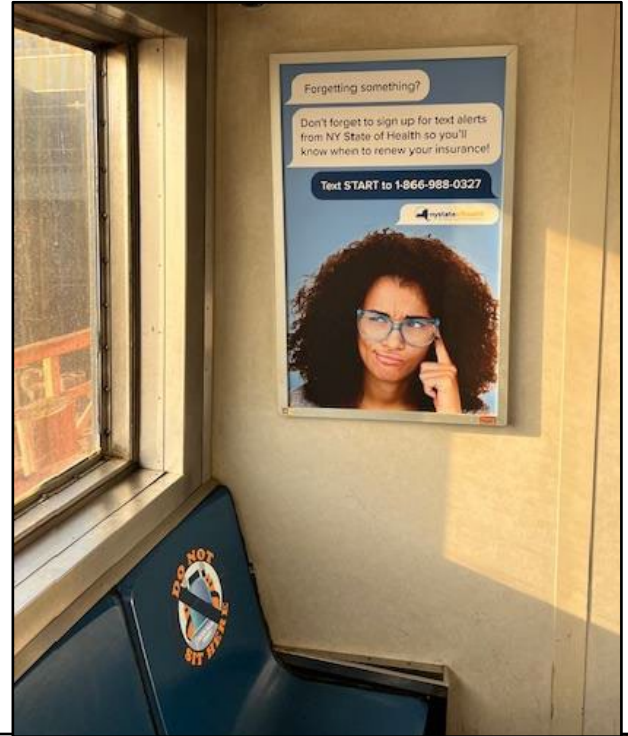
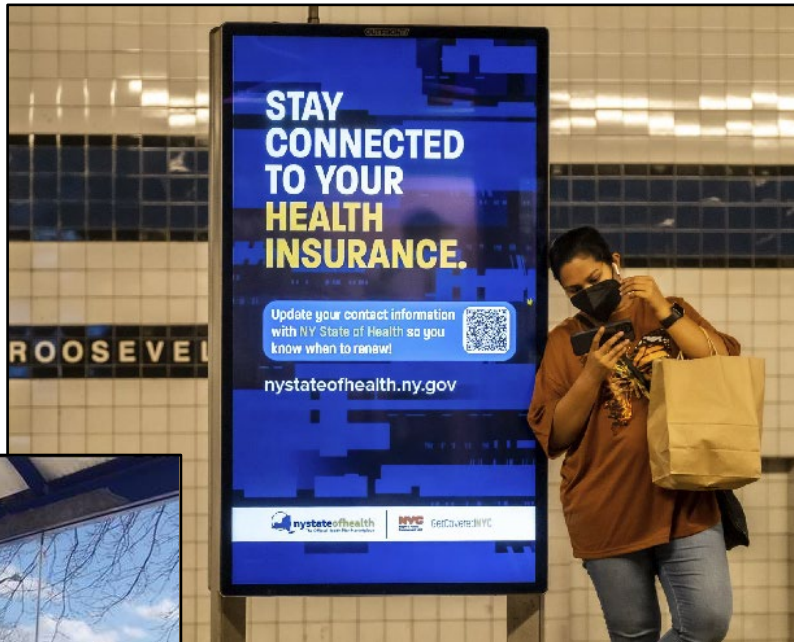
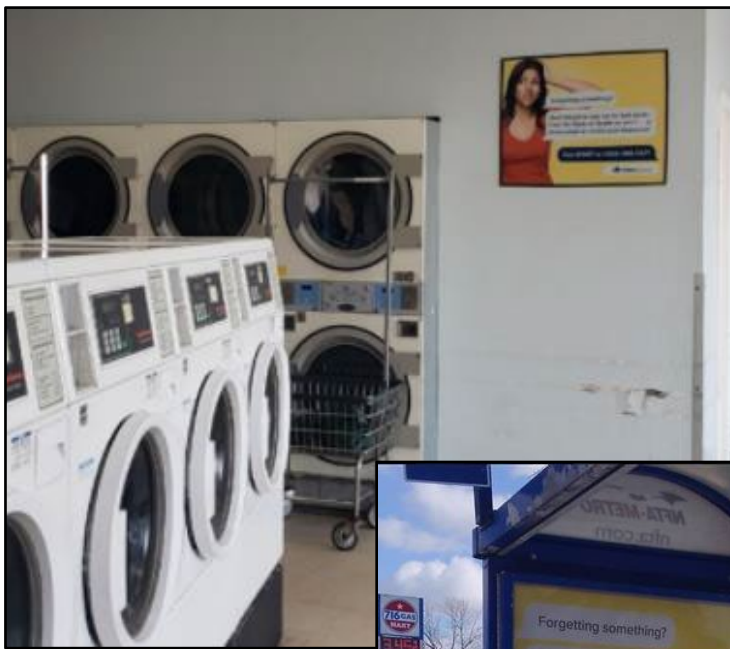
www.hudsoncountyorortho.com
tel. 201 653 4474

Czy o czymś nie zapominasz?

Nie zapomnij zapisać się, aby otrzymać powiadomienie SMS od NY State of Health i móc dowiedzieć się, kiedy odnowić ubezpieczenie!

Wyślij SMS o treści START pod numer 1-866-988-0327

OUT-OF-HOME AD SAMPLES



DIRECT MAILINGS

- In September 2022, **outreach letters** were sent to New Yorkers who enrolled in Medicaid through their Local Department of Social Services to encourage them to update their address.
- In October 2022, New Yorkers who enrolled in Medicaid, EP or CHPlus through NY State of Health received an **email** informing them how to stay connected to their health insurance through text alerts and keeping their accounts up-to-date.
- In addition to renewal notices, **emails and text messages** will be used to inform NY State of Health enrollees when it is their time to renew.

NY State of Health wants to help you stay connected to your health insurance so you have it when you need it. Here is what you can do.

1. Sign up to receive our text alerts.

- NY State of Health now offers text alerts so you don't miss important health insurance updates, including when it's time to renew your insurance. To subscribe, text START to 1-866-988-0327.
- Learn more at <https://info.nystateofhealth.ny.gov/COVID-19-Changes>.

2. Make sure your NY State of Health account is up-to-date.

We need to know your current mailing address, phone number and email address so we can contact you about your health insurance. To update your information:

- Call our Customer Service Center at 1-855-355-5777 (TTY: 1-800-662-1220)
- Log into your account at nystateofhealth.ny.gov, or
- Contact an [enrollment assistor](#)

Will be sent based on the 60-day renewal cycle

- **The week before they receive their electronic notice**, enrollees will receive an **email** that states it's almost time for them to renew and encourages them to update their contact information so they receive their renewal notice.
- **After their electronic or printed notice has been sent**, enrollees will receive a **text message** stating it was sent and instructing them to call NY State of Health if they didn't receive it.
- **Around the beginning of their renewal deadline month**, anyone who needs to take action and hasn't will receive **email and text reminders** that state they still need to renew.
- **Before the 15th of their renewal deadline month**, anyone who needs to take action and hasn't will receive a final **email** reminder that states they still need to renew.

These messages will be posted with the training materials.

EMAILS AND TEXT MESSAGES FOR RETURNED MAIL

- **When mail cannot be delivered** to the address on file for an enrollee and it is returned to NY State of Health, the enrollee will receive an **email and a text message**.
- The messages will instruct them to:
 - Log into their nystateofhealth.ny.gov account
 - Contact an enrollment assistor, or
 - Call the Customer Service Center
- These message will be sent for **all returned mail** (i.e., renewal notices and any other notice or letter from NY State of Health).

PHE Tool Kit

- This tool kit features:
 - Social Media Posts with Images
 - Text Alerts Information
 - Drop In Articles
 - Email Messages
 - Fact Sheets
 - Frequently Asked Questions
 - Posters
 - Rack Cards
 - Call Scripts
 - Materials Available for Co-Branding
 - Videos
 - Consumer Journey Infographics
- Resources are available in the following languages:
 - English
 - Spanish
 - Simplified Chinese
 - Traditional Chinese
 - Arabic
 - Bengali
 - French
 - Haitian Creole
 - Italian
 - Korean
 - Polish
 - Russian
 - Urdu
 - Yiddish

<https://info.nystateofhealth.ny.gov/PHE-tool-kit>

Unwinding from the COVID-19 Public Health Emergency: A Communications Tool Kit to Keep New Yorkers Covered

Overview

Important changes are coming. New federal rules will require New York State to begin redetermining eligibility for public program enrollees in the Spring of 2023. Enrollees in Medicaid, Child Health Plus (CHP) and the Essential Plan (EP) have not had to renew their health insurance since early 2020 due to the COVID-19 public health emergency (PHE) continuous coverage requirements for these public programs, which were adopted by the Families First Coronavirus Response Act in March 2020. However, the December 2022 Consolidated Appropriations Act included new rules ending the continuous coverage requirements starting Spring 2023.

Beginning in Spring 2023, renewal notices will be sent to enrollees in these programs based on their enrollment end dates. Renewal notices will include the deadline to take action to renew their insurance or risk having a gap in coverage. Deadlines will be based on the enrollees' enrollment end dates and will range from June 30, 2023 through May 31, 2024.

In an effort to minimize the number of New Yorkers at risk of losing their Medicaid, CHP or EP coverage, NY State of Health is working with partners, local districts and other stakeholders to inform New Yorkers about renewing their coverage and exploring other available health insurance options if they no longer qualify for Medicaid, CHP or EP.

Phase 1: Prepare for the renewal process and educate Medicaid, CHP and EP enrollees about the upcoming changes and the importance of opting in for text messages from NY State of Health so they'll know when it is time to renew their coverage.



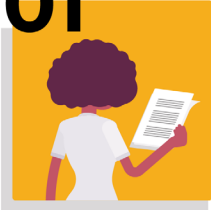
Phase 2: Encourage enrollees to update their address and contact information to ensure the renewal information NY State of Health sends will reach them.



Phase 3: Ensure Medicaid, CHP and EP beneficiaries take the necessary steps to renew coverage and transition to other coverage if they are no longer eligible for Medicaid, CHP or EP.

HOW TO RENEW YOUR NY STATE OF HEALTH INSURANCE WITH MICHELLE

01



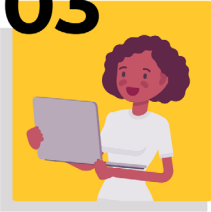
Michelle received her renewal notice in the mail. Her notice stated she must take action and renew by a specific date.

02



Her notice detailed different ways to renew, such as logging in to her account at nystateofhealth.ny.gov, speaking with a Certified Enrollment Assistor, or calling [1-855-355-5777](tel:1-855-355-5777).

03



Michelle needed to update her account with any changes that may affect her health insurance coverage - like income, family or address.

04



She visited nystateofhealth.ny.gov and clicked the 'Get Enrollment Help' button to find a Certified Enrollment Assistor. The assistor provided her with free renewal support.

05



Michelle was able to renew her Medicaid health plan and avoid a gap in coverage.

NY State of Health Consumer Journey

- **Outreach to Stakeholders**

- NY State of Health and DOH Office of Health Insurance Programs staff regularly meet with federal partners to advocate for guidance that accommodates New York's concerns, and with health plans, consumer advocates, enrollment assistors, among other stakeholders about the winddown

- **Working with Local Departments of Social Services (LDSS) and Human Resources Administration (HRA), NYC Dept. Of Health & Mental Hygiene**

- DOH is producing ads branded with NYS Medicaid that offices can play in their waiting rooms, add to their websites, or post on their social media channels
- DOH has created FAQs regarding post-COVID Medicaid eligibility topics, as part of the PHE Tool Kit

QUESTIONS?



Consumer Contact Information and Undeliverable Mail

UPDATING CONSUMER CONTACT INFORMATION

All consumers will be prompted to review their current information.

The pop-up to the right will periodically appear and needs to be responded to when accessing the Overview Page of the consumer's account.

- This message will continue to display on the consumer's overview page of their account until it has been responded to.

Napoleon, please review the following...

It is important that NY State of Health has your most current information on record. You can also make managing your account easier by going paperless and opting in to receive important updates right on your phone by text message.

Mailing Address C/O Macaron Profiterole
1234 Consumer Way APT 2
Schaghticoke, NY 12154-2533

Primary Phone (555) 555-5555 ext. 123 (Work)

Email Address nprofiterole23@gmail.com

Receive Paperless Notices? No

Receive Text (SMS) Alerts? No

No Changes Needed ✓

I Need to Make Changes ✎

REVIEWING AND UPDATING CONSUMER CONTACT INFORMATION

If the consumer clicks on, “I Need to Make Changes,” they will be brought back to the Account and Identity Information page where they can make changes to their:

- Address(es)
- Phone number(s)
- Email Address(es)
- Communication Preferences
- Language Preferences

Please complete a full LSC if Household Address, (where the consumer is actually living) changes.

The Updated information will save after agreeing to the General Privacy Attestation and clicking on “Next.”

Identifying Information

NY State of Health includes protected systems that contain United States ("US") and New York State government information. Your actions are monitored and audited under strict US and New York State laws.

Household Address

Tell us where you live. Enter the house or building number and street name in Address Line 1. Enter your apartment number, room number, or suite number in Apt / Suite. This should be the address that is on your U.S. Driver's License or other government issued Photo ID. Your household address cannot include a post office box.

Address Line 1 * Apt/Suite Address Line 2

City * Zip Code * County * State *

Communication Preferences *

Please choose how you want NY State of Health to send you notices and other important information about your health coverage.

- Paperless** – get an email alert when NY State of Health posts a new notice to your online account
- Printed** – receive paper notices by U.S. Postal Service
- Alternative Format** – receive notices in a format accessible for individuals who are blind or seriously visually impaired

Telephone Numbers

NY State of Health will use the primary phone number for all communications. You can include another phone number with which you would like to receive text messages.

Primary Phone Number * Extension Type *

(555) 555 - 5555 x Cell

Use this number when contacting me by phone.

Language Preferences

Tell us the language you prefer to speak or read so that we can better accommodate your needs.

Preferred Language - Spoken * Preferred Language - Written *

English English

Email Address

NY State of Health will contact you with account updates and other important information. We will never include any private or confidential information in email. You will be directed to our website for more information.

Email Address Confirm Email Address

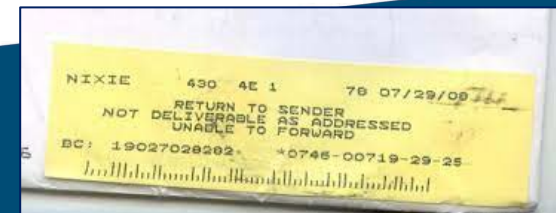
I agree with the [General Privacy Attestation](#)

Next

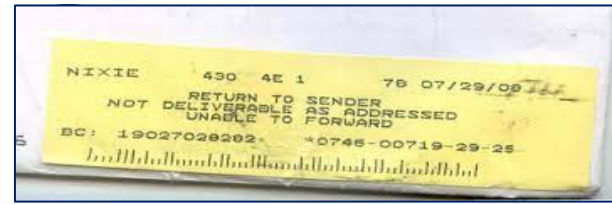
UNDELIVERABLE MAIL

DOH has been sending Assistors lists of consumers who are on their dashboard who have undeliverable returned mail with no forwarding address throughout the Public Health Emergency (PHE).

- We have been asking you, the Assistor, to do outreach to these consumers who you have worked with and have a relationship with, to try to get an updated address or, seek their permission to update their contact preference to receiving electronic notices.
- We appreciate all of your efforts in doing this and understand that you cannot always reach the person.
- NY State of Health will continue to try to get updated information from these consumers and appreciate your continued support in this effort.



UNDELIVERABLE MAIL



When will NY State of Health begin taking action on mail returned as undeliverable?

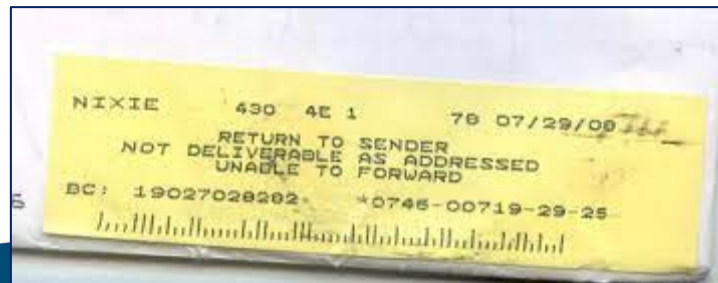
Undeliverable mail rules were suspended during the PHE ensuring that notices returned as undeliverable would not affect the consumer's coverage.

- The undeliverable mail rules will be reinstated starting 7/1/2023 for new applications and for existing consumers who have already completed a renewal.
- Once a consumer's renewal is completed, if mail is returned as undeliverable, they may lose coverage.
 - Example: Consumer is enrolled in Medicaid with a coverage end date of 8/30/2023. They complete their renewal and change their household address on 7/16. They are able to enroll in their MMC plan with no gap in coverage and a start date of 9/1. Their renewal notice gets mailed 7/17 and is returned to NY State of Health as undeliverable with no forwarding address.
 - In this example, this consumer will be disenrolled from MMC 7/31/2023 and be found ineligible for coverage.
 - Rules will be presented on the next slide.

UNDELIVERABLE MAIL

What happens after the renewal, if the consumer's mail is returned as undeliverable?

- When mail is returned to NY State of Health as undeliverable with no forwarding address, the consumer's account will be updated and the address will be marked "invalid".
- A notice will be posted to the consumer's account indicating that an eligibility determination was made based on the invalid address.
 - Consumers enrolled in MA/CHPlus/EP will be determined ineligible for coverage.
 - APTC/CSR consumers will have their eligibility changed to Full Pay QHP.
- Consumers should update their address ASAP. If they verify that the address is correct, the Assistor should assist the consumer with signing up for electronic notices.



Consumer Identity Proofing

IDENTITY PROOFING DURING THE PHE

During the PHE, NY State of Health temporarily allowed Assistors to help consumers who were unsuccessful in being identity proofed through the on-line process, to continue their application in real time by attesting to their identity over the phone.

- Assistors were instructed to obtain a copy of the consumer's identity proofing documentation so it could be submitted and linked to the account at a later date.

In some instances, this final step was not able to be completed.

- As a result, some consumers whose identity was only able to be verified verbally by the Assistor, may be asked to complete identity proofing again when they update their account 7/1 or later or when they renew.

IDENTITY PROOFING REMINDER

The Assistor can help the consumer complete manual identity proofing using the NYSOH Mobile Upload App.

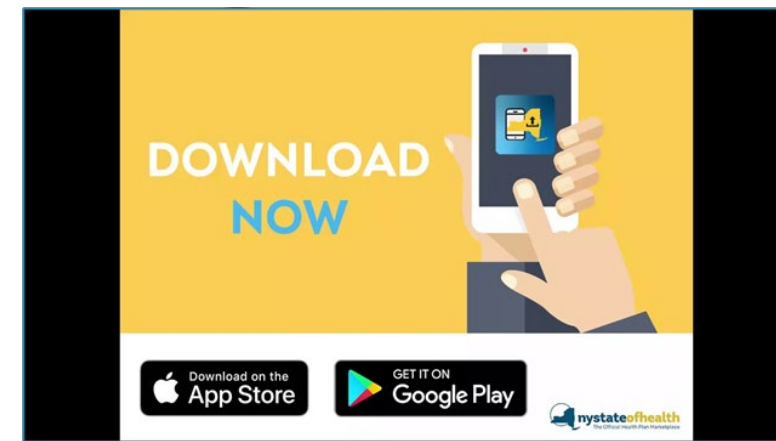
- This method is preferred.

If the consumer needs to be identity proofed manually using the paper process, the forms needed, including the “Identity Proofing Fax Coversheet for Assistors,” are available on the Assistor Tool Kit.

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

- Expand “Resources for Assistors.”

Resource for Assistors on Identity Proofing: Identity Proofing Options – Resource for Assistors



Assistor Tool Kit

Welcome to the NY State of Health Assistor Tool Kit.

On this page you will find specific tools and resources to help you reach and assist consumers, and also stay up-to-date with the latest information from NY State of Health. Many of these resources can also be downloaded and printed.

Resources for Assistors

- NYSOH Assistors - Creating Your NY.gov
- NYSOH Assistors - Registering Your Account
- NYSOH Assistors - Identity Proofing Instructions
- NYSOH Assistors - Identity Proofing Fax Cover Sheet

Consumer Identity Proofing

- Identity Proofing Fax Coversheet for Assistors
- Identity Verification Form - English (DOH-5088)
- Attestation of Identity Form - English (DOH-5090)
- Identity Verification Form (Children 17 or Younger) - English (DOH-5091)
- Identity Verification Form - Spanish (DOH-5088)
- Attestation of Identity Form - Spanish (DOH-5090)
- Identity Verification Form (Children 17 or Younger) - Spanish (DOH-5091)
- **COVID-19: Guidance for Assistors**

Federal Poverty Level Desk Aids

- 2023 FPL Medicaid, Child Health Plus, Essential Plan
- 2023 Child Health Plus Desk Aid
- 2022 Income Levels for 2023 Qualified Health Plan Plan Year

Consumer Documentation Submission

CONSUMERS SUBMITTING THEIR DOCUMENTS TO THEIR ASSISTOR



Consumers may provide copies of their documents to their Assistor to be submitted.

Consumers may hand deliver their documents to the office or mail their documents to their Assistor.

- They must be in a sealed envelope, clearly marked with the Assistor's name and organization.
- The consumer's name and AC number should also be written on the consumer's paperwork which is sealed inside the envelope.
- Assistor organizations may provide self-addressed labels for this purpose.

Consumers may fax their documents to their Assistor.

- The Assistor must verify that the consumer has the correct fax number.
- The Assistor agency must ensure that the fax machine is in a secure location and that the recipient Assistor is able to promptly receive the faxed information.
- The fax cover page should include the name of the Assistor as well as the consumer's name and AC number, and the total number of pages included.

SUBMITTING CONSUMER DOCUMENTS TO NY STATE OF HEALTH



Assistors can submit consumer documents by:

Preferred Options:

- Upload from Assistor Dashboard
 - As long as the consumer is on the Assistor's Dashboard.
- NYSOH Mobile Upload app
 - Manual Identity Proofing documents only.

Other Options:

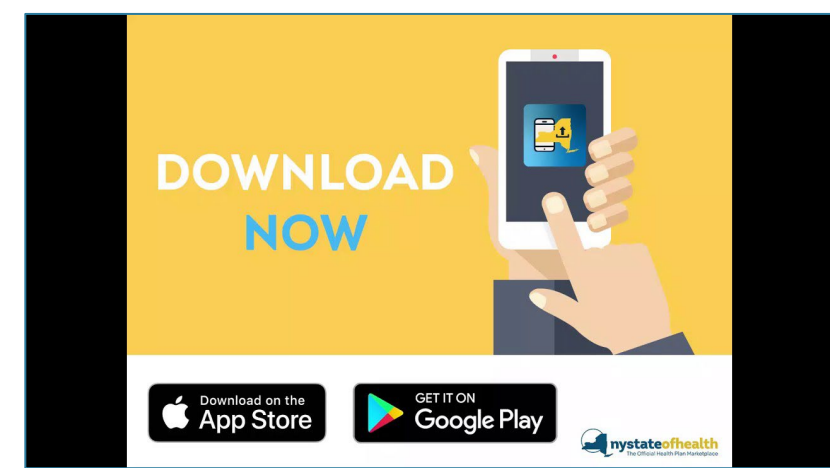
- Fax to NY State of Health
- Mail to NY State of Health

Consumers can submit their own documents by:

- NYSOH Mobile Upload app
- Upload to their account
 - Only if they have access to their account independently.
- Fax to NY State of Health
- Mail to NY State of Health

SUBMITTING CONSUMER DOCUMENTS TO NY STATE OF HEALTH

Reminder on the NYSOH Mobile Upload App



The NYSOH Mobile Upload App is quick and easy for consumers to use.

- The consumer will need to download it and then log in on a phone or tablet, choose their document from a list, snap a photo, and hit send.
- Assistors are permitted to help consumers download and use the NYSOH Mobile Upload App themselves. This method is another extremely efficient method for documentation submission. Consumers should be strongly encouraged to use this service.

Please Note: Consumers must use the app to upload their own documents into their own account.

- The only time an Assistor can use the App on their consumer's behalf is to upload manual identity proofing documents for the consumer.
- Assistors cannot upload consumer documents on their behalf using the App such as income verification.

Click the link below to watch a 4-minute demonstration of how to use the app to submit your consumer's manual identity proofing documents.

<https://meetny.webex.com/webappng/sites/meetny/recording/74c671f736a2103aadb0050568cfa40/playback>

DOCUMENTATION

NY State of Health Assistors have many resources to help you help your consumers with documentation requests.

- [Documentation List and Resources](#)
- [2023 Income Levels \(FPLs\) for Medicaid, Child Health Plus, Essential Plan, and Qualified Health Plans](#)
- [2022 Income Levels for QHP 2023 Plan Year](#)
- [Citizenship and Immigration Status Desk Aid for NYSOH Assistors](#)
- [EAD and COA Code Resource for Assistors](#)
- [Subsidy Chart by Immigration Category](#)
- [Citizenship and Immigration Document Field Resource for Assistors](#)
- [2023 QHP Out-Of-Pocket Costs – Standard Plans – Attachment B](#)
- [2023 Essential Plan Out-Of-Pocket Costs – Attachment G](#)

Looking for other Assistor training resources? Review your new resource or send us an email at:
Eligibility.Training.Support@health.ny.gov.

Need help with a case?

Discuss the case with your supervisor first. Submit the case on an encrypted Account Review Spreadsheet to: Assistor.Cases@health.ny.gov.

Dashboard Resources for NY State of Health Assistors

ASSISTOR DASHBOARD RESOURCES

AC0000052788 - Erin TestAssistor

Certification #: 998-000160

[Overview](#) |
 [My Profile](#) |
 [My Clients](#) |
 [My Assistors](#) |
 [My Inbox](#) |
 [Address History](#) |
 [Useful Links](#)

Welcome to your NY State of Health Assistor Overview tab. This screen provides an overview of any accounts which may need your attention. To manage all of your accounts, please navigate to the "My Clients" tab. You may click on the tabs above to move around your dashboard. Please be sure to review each tab for important information.

▾ Messages & Notices
1 of 1 messages | [view all](#) | [collapse](#)

Notice Id	Subject <small>click on the notices below to view or download</small>	Type	Date
Notice1025	Welcome	Notice	06/19/2017

▾ Employer Overview
[collapse](#)

Employer Account ID	Employer Name	Eligibility Status	Status Date
No outstanding items to display.			

Results: 0 to 0 of 0 (last 6 mos.) Results per Page:

▾ Individual Marketplace Overview
[collapse](#)

[Manual Renewal](#) |
 [Verification](#) |
 [Eligibility In-Progress](#) |
 [Plan Selection Needed](#) |
 [Communication Events](#)

Renewal end date range:

Show entries per page

Individual Account ID	Account Holder Name	Phone Number	Renewal LSC End Date
No data available in table			

Showing 0 to 0 of 0 entries

OVERVIEW AND MANUAL RENEWAL TAB

AC0000063824 - Nick Johnston
 Certification #: DOH-000264

Overview My Profile My Clients My Inbox Documents Address History Useful Links

Welcome to your NY State of Health Assistor Overview tab. This screen provides an overview of any accounts which may need your attention. To manage all of your accounts, please navigate to the "My Clients" tab. You may click on the tabs above to move around your dashboard. Please be sure to review each tab for important information.

▼ Messages & Notices 1 of 1 messages | [view all](#) | [collapse](#)

Notice Id	Subject	Type	Date
Notice1025	Welcome	Notice	04/29/2019

Individual Marketplace Overview [collapse](#)

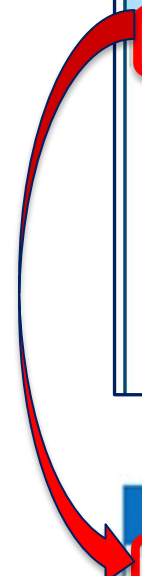
Manual Renewal Verification Eligibility In-Progress Plan Selection Needed Communication Events

Renewal end date range:

Show entries per page ← Previous 1 Next →

Individual Account ID	Account Holder Name	Phone Number	Renewal LSC End Date
No data available in table			

Showing 0 to 0 of 0 entries ← Previous 1 Next →



VERIFICATION TAB

Includes a list of consumers who have documentation due.

Individual Marketplace Overview collapse

Manual Renewal **Verification** Eligibility In-Progress Plan Selection Needed Communication Events

Show entries per page ← Previous 1 Next →

Individual Account ID	Account Holder Name Email Address	HX ID Phone Number	Program	Verification Type	Due Date
AC0000058932	Laurie Curcurito Erin.Bacheldor@health.ny.gov	HX0000062972 518-473-0000	Essential Plan	INCOME	07/24/2018
AC0000067213	Momma Bear Erin.Bacheldor@health.ny.gov	HX0000070697 518-555-5555	Child Health Plus	INCOME	07/12/2020
AC0000071137	Jenifer Joseph	HX0000073830 518-123-4567	Medicaid	RETRO_MON1_INCOME	05/24/2022
AC0000071137	Jenifer Joseph	HX0000073830 518-123-4567	Medicaid	RETRO_MON2_INCOME	05/24/2022
AC0000071137	Jenifer Joseph	HX0000073830 518-123-4567	Medicaid	RETRO_MON3_INCOME	05/24/2022
AC0000071150	Kathryn Smith	HX0000073844 518-987-1234	Advance Premium Tax Credit	INCOME	08/04/2022
AC0000071151	Gary Mitchelle	HX0000073846 518-345-1234	Essential Plan	RETRO_MON1_INCOME	05/24/2022

Results: 1 to 7 of 7 ← Previous 1 Next →

ELIGIBILITY IN-PROGRESS TAB

Includes a list of consumers who have started their application but have not submitted the application.

Individual Marketplace Overview collapse

Manual Renewal Verification **Eligibility In-Progress** Plan Selection Needed Communication Events

Show entries per page ← Previous 1 Next →

Individual Account ID	Account Holder Name Email Address	Phone Number	Application Initiated Date
AC0000053327	Gary test gursewak.bhullar@health.ny.gov	545-454-6545	04/27/2022
AC0000053391	David Seville Erin.Bacheldor@health.ny.gov	518-473-0566	03/30/2022
AC0000066351	Daffy Duck	555-555-5555	04/06/2022
AC0000070856	Dan Test erin.bacheldor@health.ny.gov	518-555-5555	02/28/2022
AC0000070857	Dan Testt erin.bacheldor@health.ny.gov	518-566-5666	02/28/2022
AC0000070930	Kaitlyn Smith erin.bacheldor@health.ny.gov	518-555-5555	03/23/2022
AC0000071097	Diego Marquez	518-542-3854	04/27/2022

Results: 1 to 7 of 7 ← Previous 1 Next →

PLAN SELECTION NEEDED TAB

Includes a list of consumers who have been determined eligible but have not enrolled in a plan.

Individual Marketplace Overview collapse

Manual Renewal Verification Eligibility In-Progress **Plan Selection Needed** Communication Events

Show entries per page ← Previous 1 Next →

Individual Account ID	Account Holder Name	Phone Number	Email Address
AC0000067213	Momma Bear	518-555-5555	Erin.Bacheldor@health.ny.gov
AC0000071137	Jenifer Joseph	518-123-4567	
AC0000071138	Giselle Minecroft	339-867-2430	
AC0000071151	Gary Mitchelle	518-345-1234	

Results: 1 to 4 of 4 ← Previous 1 Next →

COMMUNICATION EVENTS TAB

Includes a list of consumers who have flags on their account such as undeliverable mail and invalid email addresses.

Individual Marketplace Overview collapse

Manual Renewal Verification Eligibility In-Progress Plan Selection Needed **Communication Events**

Any events related to the delivery of a message or notice to an account holder that you represent will be shown in the table below. Please click on the account number and update their account if necessary.

Search Event Type

Display: 1 to 4 of 4 ← Previous 1 Next →

Individual Name Account ID	Event Type	Address	Date
Robert Fitzgerald AC00000111959	Invalid Email	bobbyfitz@gmail.com	06/12/2019
Cathie Whitehouse AC00000936925	Address Verification is Needed	31 Elm St Apt 1 Albany, NY 12202-2611	05/12/2019
Elizabeth Reineck AC00000835714	System Updated Mailing Address to Parole Officer	31 Elm St Albany, NY 12202	04/12/2019
Howard Krull AC00000526453	Mailing Address Marked Invalid - Undeliverable	24 Sfseinf St Albany, NY 12203	03/12/2019
Elizabeth Reineck AC00000835714	Change of Address Found through USPS	293 Eagle St Albany, NY 12202	02/21/2019
Howard Krull AC00000526453	System Updated Mailing Address to Correctional Facility	Anna M. Kross Center (AMKC) 18-18 Hazen Street East Elmhurst, NY 11370	02/12/2019
Elizabeth Reineck AC00000835714	Address Verification is Needed	293 Eagle St Albany, NY 12202	02/12/2019

← Previous 1 Next →

MY CLIENTS TAB AND ENROLLMENT END DATE

AC0000063824 - Nick Johnston

Certification #: DOH-000264

[Overview](#)
[My Profile](#)
[My Clients](#)
[My Inbox](#)
[Documents](#)
[Address History](#)
[Useful Links](#)

Welcome to your NY State of Health Assistor Overview tab. This screen provides an overview of any accounts which may need your attention. To manage all of your accounts, please navigate to the "My Clients" tab. You may click on the tabs above to move around your dashboard. Please be sure to review each tab for important information.

[Messages & Notices](#)
1 of 1 messages | [view all](#) | [collapse](#)

Notice Id	Subject	Type	Date
Notice1025	Welcome	Notice	04/29/2019

Manage Clients [collapse](#)

Individual

Search Individual
Select your Agency from the drop down below to view your clients or click Add New Individual to start a new Individual application. You can search your client list by entering text in the filter or sorting by column name.

Select Associated Agency *

Filter:

 Show entries

Results: 1 to 1 of 1 (filtered from 20 total entries) < Previous 1 Next >

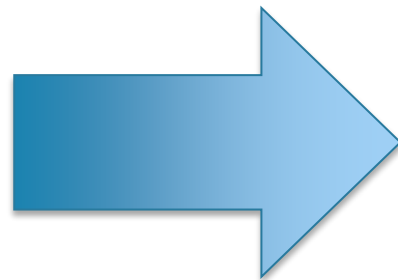
Individual Name	AccountID SSN Phone Number	Address	Eligibility End Date	Enrollment End Date	Enrollments Status	Renewal Type	Action
Richard Blake	AC0000072150 N/A 555-555-5555	123-45 Main St Albany NY, 12208	12/31/2022	12/31/2022	SUBMITTED		manage invite delete

< Previous 1 Next >

MY PROFILE TAB AND RENEWAL REMINDER NOTICES

Account Preferences

- Hide Profile from All Searches
- Hide Profile from Public Search
- Send me Client Renewal Reminder Notice



Erin Test
1 Main Street
Albany NY 12205

November 16, 2022
Account ID: AC0000000000

Dear Erin Test,

Thank you for enrolling individual clients on NY State of Health. You are receiving this notice to alert you of individuals, on your dashboard, that are due to renew their health coverage. **Note that most individuals must update their application by the 15th of month to renew their coverage.** Included in this notice, please find a listing of Account IDs for households with one or more members due to renew within the next 45 days through NY State of Health.

The information included in this notice is believed to be accurate and is for general information purposes only. While every effort has been made to ensure an accurate report, NY State of Health provides no guarantee regarding the accuracy of this report, therefore accepts no liability what so ever for any information subsequently proved incorrect.

If you have questions or need assistance, please contact NY State of Health at 1-855-355-5777 or <https://www.nystateofhealth.ny.gov>. There is no charge for these services.

If you need this information in a language other than English, or you need assistance reading this letter we can help you. Call 1-855-355-5777 (TTY - English: 1-800-662-1220; TTY - Spanish: 1-877-662-4886).

Sincerely,
NY State of Health

Account ID	Coverage End Date	Renewal Status
AC0000000000	12/31/2022	Manual
AC0000000001	12/31/2022	Manual
AC0000000002	12/31/2022	Manual
AC0000000003	12/31/2022	Auto
AC0000000004	12/31/2022	Auto

ASSISTOR OVERSIGHT MANAGERS (AOMs)

Assistor Oversight Managers have the ability to help their Assistors who are assigned to them. They can look at their Assistors' dashboards and their Assistors' consumers' accounts.

All of the same tools and resources can be seen through the AOM view.

- AOMs can view all of their Assistor's dashboards using the "Assistors" sub-tab of their AOM Dashboard.
- AOMs can view any consumer's account that one of their Assistors manages using the "Assistors' Clients" sub-tab.

If an Assistor agency wants to assign an AOM and/or secondary AOMs, please send an email to: Assistor.Admin@health.ny.gov.

AC0000052788 - Erin TestAssistor
Certification #: 998-000160

Overview My Profile My Clients **My Assistors** My Inbox Documents Address History Useful Links

My Assistors collapse

Assistors Assistors' Clients Reports

View your Assistors in the table below. The table can be filtered and searched. Selecting "Export CSV" will generate a file of the current search results with all applied filters.

Select Agency: NYS DOH Name: []
Address/Zip Code: [] Counties Served: [] Secondary OM: []
Clear Filters Search

Filter: [] Results per Page: 10 [] Previous 1 Next []

Name (Last, First)	Address	Counties Served	Agency	Secondary OM	Actions
TestAssistor, Alicia assistor.admin@health.ny.gov 518-473-0566	999 Center Avenue Albany, NY 12203	View	NYS DOH	—	View
TestAssistor, Erin erin.bacheldor@health.ny.gov 518-473-0566	1 W Albany Dr Albany, NY 12205	View	NYS DOH	—	View
TestAssistor, K erin.bacheldor@health.ny.gov 555-555-5555					View
TestAssistor, N nick.johnston@health.ny.gov 518-474-7334					View

AC0000052788 - Erin TestAssistor
Certification #: 998-000160

Overview My Profile My Clients My Assistors My Inbox Documents Address History Useful Links

My Assistors collapse

Assistors Assistors' Clients Reports

Employer Employee Individual

Search Individual
View your Assistors' clients in the table below. The table can be filtered and searched. Selecting "View" will navigate to a read-only version of that dashboard.

Select Associated Agency*: NYS DOH Select Assistor: Killey TestAssistor
Consumer First Name: [] Consumer Last Name: [] Consumer DOB: [MM/DD/YYYY] [] Consumer Account Number: []
Clear Filters Search

Filter: [] Results per Page: 25 [] Previous 1 Next []

Individual Name	AccountID	Address	Eligibility End Date	Enrollment End Date	Enrollment Status	Renewal Type	Action
Cheryl Test	AC0000051787 518-123-4567	162 Washington Ave Albany, NY, 12210	N/A	N/A	IN_PROGRESS		View
Forever Twentyone	AC0000051908 518-123-4567	99 Washington Ave Albany, NY, 12210	04/30/2018	04/30/2018	SUBMITTED		View
George Jetson	AC0000052878 ***-**-1177 518-244-0522	192 Lark St Albany, NY, 12210	12/31/2019	12/31/2019	SUBMITTED		View
Hasu WilliamThompson	AC0000051575 518-370-0522	99 Washington Avenue Albany, NY, 12205	N/A	N/A			View
line	AC0000052178	148 S Swan St Albany, NY, 12210	N/A	N/A			View

The AOM role is for Assistors only, and does not apply to Brokers.

UNWINDING RESOURCES FOR NY STATE OF HEALTH ASSISTORS

NY State of Health has also sent all Assistors some *new* resources.

Unwinding Resources for Assistors

- Tools for Assistors
- Application and Plan Selection Tools
- Trainings and Video Demos for Assistors
- Resources for Assistors
- Email Contacts for Assistors
- Call Center Information for Assistors

Assistor Tips for Document Review

- How consumers can find out what type of documentation they need to submit.
- How Assistors can find out which consumer's need to submit what types of documents.
- How to find out if the submitted documents were approved.

Unwinding from the Public Health Emergency NY State of Health Assistor Resources

Tools for Assistors

- [Public Health Emergency Unwind Information Page for Medical Enrollees](#)
- [Public Health Emergency Unwind Communications Toolkit for Partners](#)
- [Assistor Toolkit](#)
 - This website has the Manual ID Proofing forms in English
- [Outreach Toolkit](#)

Application and Plan Selection Tools:

- [Compare Plans and Estimate Cost Tool](#)
 - AKA: QHP Anonymous Plan Search Tool
- [Dental Plan Comparison Tool](#)
- [Plans by County Search Tool](#)
- [Hospital Participation Search Tool](#)
- [NYS Provider and Health Plan Look Up Tool](#)
- [Premium and Out of Pocket Estimator](#)
- [Employer Health Insurance Affordability Calculator](#)

Trainings & Video Demos for Assistors

- [Assistor Spotlight](#)
- [Assistor Academy](#)
- [Training on...](#)
- [Training on...](#)
- [How to chat...](#)
- [2023 Dental...](#)
- [Training on...](#)
- [Assistor Tra...](#)

Resources for Assistors

- [Documenta...](#)
- [2023 Incom...](#)
- [Qualified He...](#)
- [2022 Incom...](#)
- [Citizenship...](#)
- [EAD and C...](#)
- [Citizenship...](#)

Unwinding from the Public Health Emergency NY State of Health Assistor Resources

- [Dependent Income and Title II Social Security](#)
- [2023 QHP Out-Of-Pocket Costs – Standard Plans – Attachment B](#)
- [2023 Essential Plan Out-Of-Pocket Costs – Attachment G](#)

Email Contacts for Assistors

- General or specific Assistor training questions: Eligibility.Training.Support@health.ny.gov
- Case specific questions that have already discussed with a supervisor/program manager should be submitted on an encrypted Account Review Spreadsheet via the email below. Assistor.Cases@health.ny.gov
- Help with Assistor accounts, Oversight Manager accounts, or agency staff changes. Assistor.Admin@health.ny.gov
- Navigator Agencies submitting contract documents (CC your Navigator Contract Manager). Navigator.Admin@health.ny.gov

HOW TO HELP A CONSUMER WITH THEIR REQUEST FOR DOCUMENTATION

When assisting a consumer applying for health insurance, they may be asked to provide some documentation. This is so that the marketplace can verify the information that the consumer entered in their application before they are determined fully eligible.

CHECK THE CONSUMER'S ELIGIBILITY DETERMINATION SCREEN

The eligibility determination screen will indicate that the consumer must submit documentation.

CHECK THE CONSUMER'S NOTICE

Directly below the consumer's eligibility result, you will find instructions on what the consumer needs to do next.

What you need to do next: Provide additional information in order to provide NY State of Health can be found. Additional information to Confirm Your Eligibility.

You will also see the specific request in the "Request for Additional Information to Confirm Your Eligibility"

Requesting for Additional Information to Confirm Your Eligibility

Additional information is required to confirm eligibility for members of your household. Please review the following table to determine what information is required for your household.

Provide proof of Citizenship Status by December 04, 2023 for:	Marketplace ID: H00000074408
Janice Plano	
Provide proof of Social Security Number by December 01, 2023 for:	Marketplace ID: H00000074408
Janice Plano	
Provide proof of income by December 01, 2022 for:	Marketplace ID: H00000074408
Janice Plano	

Please note: If you miss the due date, you may lose your insurance or receive less help paying for your coverage.

The documentation list in the consumer's notice will tell them what types of documents would be acceptable based on the type of request. Click [here](#) to access this resource.

CHECK YOUR DASHBOARD

On your Assistor dashboard overview tab, you will see a section called "Individual Marketplace Overview". You will see several tabs that highlight accounts in which a member needs to provide documentation to become fully eligible for coverage in NY State of Health.

An account will appear here as needing documentation verified until the request for documentation is satisfied. Once the documentation has been verified and the consumer has been determined fully eligible, the account will no longer appear in this section.

Account ID	Account Holder Name	Marketplace ID	Program	Verification Type	Due Date
A000001270	Janice Plano	H00000074408	Medical	OTHER PLAN	04/24/2024
A000001270	Janice Plano	H00000074408	Medical	OTHER PLAN	04/24/2024
A000001270	Janice Plano	H00000074408	Medical	OTHER PLAN	04/24/2024
A000001270	Janice Plano	H00000074408	Medical	OTHER PLAN	04/24/2024
A000001270	Janice Plano	H00000074408	Medical	OTHER PLAN	04/24/2024

ALL THE COLUMNS ARE SORTABLE

- Account ID – This will order the account numbers, smallest to largest which will group the documentation requests for household members of the same account number together. An account may have multiple requests for documentation that may be satisfied with one submission.
- Account Holder Name – This will order the account holder's name alphabetically.
- HX ID – This will order the household member's HX numbers in order smallest to largest.
- Program – This will order the names of the programs that the person might be eligible for alphabetically.
- Verification Type – This will order the type of documentation requests alphabetically.
- Due Date – This will order the documentation due dates in order. This will allow you to prioritize your consumer's documentation requests by due date.

QUESTIONS ABOUT A SPECIFIC CONSUMER ACCOUNT? (518) 473-0566 ASSISTOR.CASES@HEALTH.NY.GOV

UNWINDING RESOURCES FOR NY STATE OF HEALTH ASSISTORS

Available May 1, 2023:

NY State of Health will also be opening up a dedicated telephone line for all Assistors for “quick calls.”

1. Dashboard Transfers

- Assistors must have the consumer present on a three-way call.
- The consumer must authenticate themselves and authorize the Assistor.
 - Only one account transfer per call for consumer privacy.

2. HX ID Resolution

- For when NY State of Health finds that a consumer may already be known to the system.

3. Alternative ID Proofing

- If the consumer has ever received public benefits in the past through LDSS/HRA, the Call Center may be able to identity proof them over the phone.

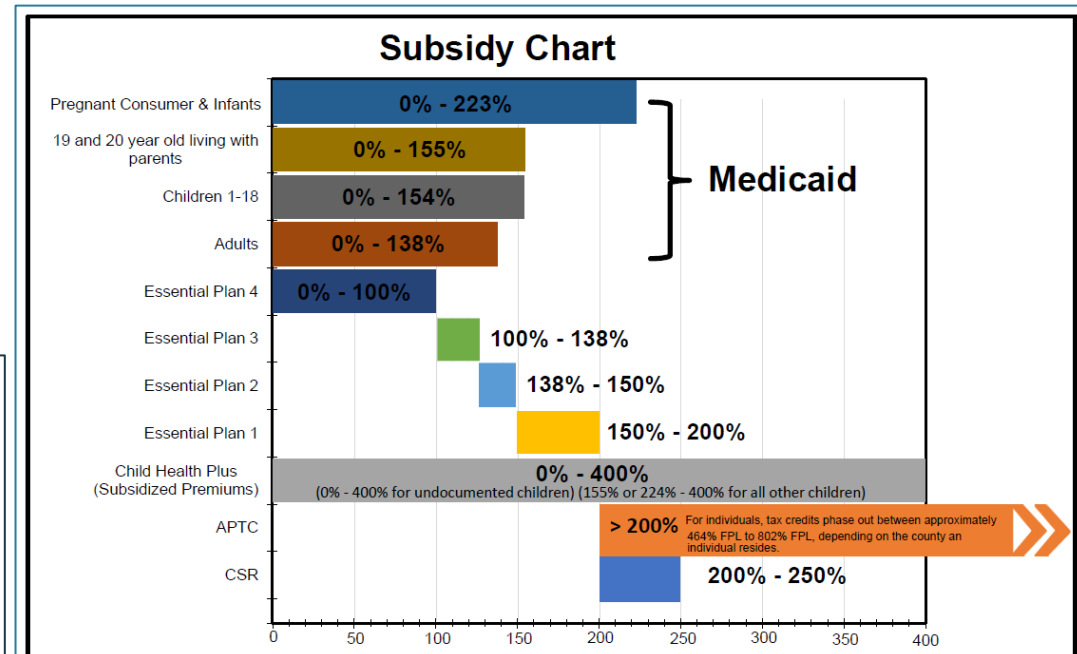
WRAP-UP

If consumers are transitioning to different programs and you, the Assistor, need assistance, please send the case on an encrypted account review spreadsheet to:

Assistor.Cases@health.ny.gov

Click link below for instructions on using the Account Review Template for NY State of Health Assistors.

<https://info.nystateofhealth.ny.gov/news/assistor-training-account-review-template>



Note:
Consumers age 65 and older, who are not parent/caretaker relatives and are ineligible for Medicare and Medicaid, may be eligible for PTC and CSR starting at 100% FPL.
Parent/caretaker relatives age 65 and older who are not enrolled in Medicare and are ineligible for Medicaid due to being above the Medicaid income threshold, may be eligible for PTC and CSR starting at 138% FPL.
For individuals, tax credits phase out between approximately 464% FPL to 802% FPL, depending on the county an individual resides.

QUESTIONS?



EMAIL CONTACTS



- If you have general Assistor training questions, or questions about this specific training, please send them to:
Eligibility.Training.Support@health.ny.gov.
- If you have a case specific question that you have already discussed with your supervisor or program manager, the issue should be submitted on an encrypted Account Review Spreadsheet to:
Assistor.Cases@health.ny.gov.
- If you are a broker and have questions about this specific training, please send them to NYSOHBrokerSupport@health.ny.gov

RECERTIFICATION PROCESS



- All Assistors and Assistor Oversight Managers who are registered or completed the online Assistor certification training by **10/31/2023** will be required to view the recertification webinars. The material included in each webinar is a supplement to what was provided during the initial online course.
 - <https://info.nystateofhealth.ny.gov/SpringTraining>.
- Keep track of the date you watched the live webinar or the video for each of this year's recertification webinars.
- Provide your dates to your supervisor so they can complete the Recertification Report.

THANK YOU FOR JOINING US!

- We will notify all Assistors via email once this webinar has been posted.
- Please complete the survey:
 - Evaluation of Webinar: Unwinding – Part 2

