

How to Create a Broker Account

1. Once you have created your NY.gov ID and set your password (see the guide, "How to Create a NY.gov ID"), return to the Brokers tab from the NYSOH home page and select *CLICK HERE TO LOGIN*.

The screenshot shows the NYS State of Health website. The top navigation bar includes "New York State", "State Agencies", and a search bar. Below this is the "nystateofhealth" logo and a menu with "Individuals & Families", "Employers", "Employees", "Brokers" (highlighted with a red box), and "Navigators".

Below the navigation bar, there is a section titled "INTRODUCING THE NYS Provider & Health Plan Look-Up" with a "Search By Health Plan, Provider, or Facility" button and a "Read More" link. To the right, a text box describes the tool: "The NYS Provider & Health Plan Look-up is an internet tool that can be used by consumers to investigate/research provider networks and health plans. Using this tool, consumers can look up their preferred providers, including doctors and hospitals, in order to see which health plans have them in their network."

The main content area is titled "Brokers". It contains the following text: "Through our online portal and your own personalized user account, you will be able to provide the following valuable services quickly and easily for all your clients: Group setup and enrollment for new clients, view and manage open enrollment activity, upload and edit employee rosters; process client renewals and manage client activity." and "NY State of Health will share all client communication as well as provide you with updates and information on the marketplace via your private email account and inbox located on the portal."

On the right side, there is a "Get Started" sidebar. It contains two sections: "Returning Users" with a link "CLICK HERE TO LOGIN" (highlighted with a red box) and "With your NYS GOV ID.", and "New Users" with a link "CLICK HERE TO REGISTER" and "Create a NYS GOV ID."

At the bottom of the page, there is a button that says "click here to access **Producer Tool Kit**".

2. On the Create an Account page, enter your *Invitation Code* and your *License Number* and click *Next*.

Logged in as dittwoemp Sign Out

New Account

1. Invitation > 2. Build Account > 3. Identity Verification > 4. Agreement > 5. Setup Profile

Create an Account

Congratulations!

You have successfully completed the NY State of Health Training and can now proceed with the account registration process.

Brokers: Enter your **State License Number** and Invitation code that was emailed to you.

All other Assistors: Enter your **Agency Contract ID** and Invitation code that was emailed to you.

If you have completed the training course and have not yet received an invitation code, you can contact customer service for assistance: 1-855-355-5777

State License Number
or Agency Contract ID:

Invitation Code:

Next

3. On the Build Account screen, First and Last name will populate based on the License Number and Invitation Code entered on the previous screen. Enter your *Legal Residence* (for identity proofing purposes) as well as other contact information such as *Mailing Address*, *Business Address*, and check the boxes under the Agreement section. Once finished, click the *Create an Account* button.

New Account

1. Invitation2. Build Account3. Identity Verification4. Agreement5. Setup Profile

Create an Account

Account Information

Please provide the following contact information and communications preferences so we may verify your identity and set up your account.

Account Holder

First Name: JENSING

Middle Name:

Last Name: HARAN

Suffix: --Select

Legal Residence

Address Line 1: Address Line 1

Address Line 2: Address Line 2

City: City

Zip: Zip State: State

Contact Info

E-mail Address: laxman.pesari@csra.com

Primary Phone Number: X Select

Preferred Phone Number: Home

Add Another Number

Agreement

State Exchange will perform a background check on you. You will not be allowed to manage client information unless you are a certified Broker.

☐ I attest that I am licensed to conduct business in NYS

☐ I have read and agreed to terms and service

☐ I agree with the General Privacy Attestation

Mailing Address

Same as residence

Address Line 1: Address Line 1

Address Line 2: Address Line 2

City: City

Zip: Zip State: State

Business Address

Same as residence

Address Line 1: Address Line 1

Address Line 2: Address Line 2

City: City

Zip: Zip State: State

Create an Account

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4. On the Identity Verification screen, select your *Gender*, enter *Date of Birth* and *Social Security Number*. Click *Next* to continue.

New Account

1. Invitation > 2. Build Account > 3. Identity Verification > 4. Agreement > 5. Setup Profile

Create an Account

Account and Identity Information

Identity proofing is used by the Marketplace to ensure only authorized individuals have access to personal or proprietary information.
Please enter your personal information below.

Gender *
☒ Male ☐ Female

Date of Birth *
07 21 1988

Social Security Number *
4324

Next

5. Answer Experian questions based on the personally identifying information previously entered. Click the *Next* button when finished.

Create an Account

1. Invitation > 2. Build Account > 3. Identity Verification > 4. Agreement > 5. Setup Profile

Create an Account

Personal Identifying Information

Please answer the following questions to allow verification of your identity.

According to your credit profile, you may have opened an auto loan in or around April 1998. Please select the lender for this account. If you do not have such an auto loan, select 'NONE OF THE ABOVE/DOES NOT APPLY'.

☐ TOYOTA MOTOR CRED
☐ MITSUBISHI MOTORS CRED OF AMERICA
☐ FIRST UNION
☐ BANK ONE
☐ NONE OF THE ABOVE/DOES NOT APPLY

Please select the number of bedrooms in your home from the following choices. If the number of bedrooms in your home is not one of the choices please select 'NONE OF THE ABOVE'.

☐ 2
☐ 3
☐ 4
☐ 5
☐ NONE OF THE ABOVE

Using your date of birth, please select your astrological sun sign of the zodiac from the following choices.

☐ AQUARIUS
☐ PISCES
☐ SCORPIO
☐ TAURUS
☐ NONE OF THE ABOVE

Which of the following is a current or previous employer? If there is not a matched employer name, please select 'NONE OF THE ABOVE'.

☐ TRANSWESTERN PUBLISHING
☐ USPS
☐ NORTHROP GRUMMAN
☐ ARBYS ROAST BEEF
☐ NONE OF THE ABOVE

Next

6. If the identity verification questions are successfully answered, a confirmation screen will appear. Click *Continue* to finish creating the account.

The screenshot shows the 'New Account' page with a progress bar at the top indicating steps: 1. Invitation, 2. Build Account, 3. Identity Verification, 4. Agreement, and 5. Setup Profile. The main content area is titled 'Create an Account' and displays a confirmation message: 'Congratulations! You are authorized to conduct business on NY State of Health.' It lists the user's name as 'CSCBROKERONE CSCBROKERONE', the certification number as 'SI00258', and the certification expiration date as '2019-05-19'. To the right, it says 'Certified By:' followed by the 'nystateofhealth' logo and the text 'The Official Health Plan Marketplace'. A 'Continue' button is located at the bottom right of the confirmation box.

- If Identity Proofing is unsuccessful, the following message will display. Be sure that only personal information was entered and not the information for your business. Click *Close* and call the NYSOH Customer Service Center for additional help at 1-855-355-5777.

Note: Security questions must be answered within 10 minutes and only 5 attempts can be made. Once 5 attempts and/or 10 minutes is up, the account will be locked for 24 hours.

The screenshot shows the 'New Account' page with a progress bar at the top indicating steps: 1. Invitation, 2. Build an Account, and 3. Identity Verification. The main content area is titled 'Create an Account' and has a sub-header 'Personal Identifying Information'. It asks the user to 'Please answer the following questions to allow verification of your identity.' A red error message box states: 'We were unable to verify your identity. Try again to answer the following questions. Or call the Marketplace at 1-855-355-5777 for more information on how to continue with the process.' Below this, a question asks the user to select the lender for an auto loan based on their credit profile, with options: TOYOTA MOTOR CRED, MITSUBISHI MOTORS CRED OF AMERICA, FIRST UNION, BANK ONE, and NONE OF THE ABOVE/DOES NOT APPLY.

7. Next, is the Create Profile screen which is the final step of the Identity Proofing/Account Setup process.

New Account

1. Invitation > 2. Build Account > 3. Identity Verification > 4. Agreement > 5. Setup Profile

Create Profile

State Unique ID: ku811 License: ku811 Certification: SI00622 Expiration: 2019-10-10 Status: Approved

Account Preferences

☐ Hide Profile from Public Search

☒ Send me Client Renewal Reminder Notice

Group Size

☐ Individual ☐ 2 - 10 ☐ 11 - 25 ☐ 25+

You can select more than one county or language by holding down the control button when making your selection.

Counties List **Counties Served** **Languages List** **Languages Supported**

ALBANY
ALLEGANY
BRONX
BROOME

Chinese
English
French
French Creole

Available Issuer List **My Issuer Affiliations**

Affinity Health Plan
BlueCross BlueShield of Western New York
BlueShield of Northeastern New York
CareConnect

Agency Affiliation:

Enter Agency's License Number to add to your list.

Agency Name Agency EIN (Tax ID)

My Agency Affiliations **EIN/Tax ID** **License No.**

XYZ corp 1234567 013168 [remove](#)

☒ Can work Independently on the Marketplace

Please confirm that the information above, related to your NY State of Health certification and service details is accurate. This information will be displayed when potential clients are searching for a Broker, Navigator or Certified Application Counselor.

Submit

- In the top section, under Account Preferences, review the two checkboxes: “Hide Profile from Public Search” and “Send me Client Renewal Reminder Notice.” Checking “Hide Profile from Public Search” will eliminate you from the public search tool as a Broker in your area. This must be manually checked if you do not wish to appear in the public search results on the NYSOH. The next checkbox, “Send me Client Renewal Reminder Notice”, is automatically checked and will allow the system to send Renewal Reminders on all clients listed in your broker portal on the NYSOH. Then select all *Group Sizes* you wish to work with.
- Select the *Counties Served* by selecting the appropriate Counties in which you do business from the corresponding list. Repeat in the *Languages Supported* and the *My Issuer Affiliations* sections.
- Under the *Agency Affiliations* section, enter the Agency’s License Number and the affiliated Name and EIN will automatically populate. More than one agency may be added. If you do not work with an agency, check the box that you “Can work Independently on the Marketplace” which will allow you to enroll clients directly without an agency affiliation.
- Click *Submit* once complete.

8. On the Agreement screen, review the Individual and Small Business Marketplace Broker Agreement. You may also *print* or *download* the document to have a copy for your records by clicking the corresponding button in the upper righthand corner of the screen. Click the checkbox that says you have read and agree to Privacy and Security requirements. Click *Next* to continue.

New Account

1. Invitation > 2. Build Account > 3. Identity Verification > **4. Agreement** > 5. Setup Profile

Create an Account

Agreement

Please read each of the statements in the agreement. Then click Agree to show that you have read the statements and agree with them.

Download | Print

INDIVIDUAL AND SMALL BUSINESS MARKETPLACE
AGENT / BROKER AGREEMENT
Background
NY State of Health, The Official Health Plan Marketplace ("NY State of Health" or "Marketplace") allows small businesses, individuals and families to compare health insurance options and enroll in coverage. It assists qualified small employers by facilitating the enrollment of eligible employees into qualified health plans ("QHPs") through the Small Business Marketplace. It assists individuals and families by determining eligibility for QHPs and for premium tax credits, cost-sharing reductions, Medicaid, Child Health Plus and the Essential Plan ("Insurance Affordability Programs"); and enrolling individuals into the health coverage for which they are eligible through the Individual Marketplace.
To maximize access to health insurance coverage, the NY State of Health desires to certify certain licensed brokers and agents ("Producers") to:
(1) assist eligible employers in purchasing QHPs through the Small Business Marketplace; and
(2) assist individuals and families in applying for coverage through the Individual Marketplace;
provided that the Producer has satisfied the requirements set forth in this Agreement and a signed copy of this Agreement has been filed with the NY State of Health.
A Producer may choose to complete the certification requirements for the Small Business Marketplace only. Following a
☐ I have read and agreed to the Privacy and Security Requirements

Next

9. After successfully passing Identity Proofing, you will be prompted to generate a token. Click the green *Generate Token* button. This token will be sent to the email entered when creating your NY.gov ID. After retrieving this token from your email, copy and paste it into the *Enter Security Token* field and click *Next*.
- The token is valid for 60 minutes. Generate a new token each time you access your account. If this process is interrupted and you need to continue at a later time, click the *Generate Token* button again to receive a new token.

The screenshot shows a web interface titled "Secure Login". Below the title is a section titled "Request a Security Token" in green. The text explains that to provide a secure environment for health insurance applications, NY State of Health requires multi-factor authentication, with a verification code (token) sent to the user's email. It states that tokens expire after 60 minutes and offers two options: enter a valid one now or click "Generate Token" to receive a new one. A green "Generate Token" button is prominently displayed. Below it is a text input field labeled "Enter Security Token". To the right of the input field is a link "Click Next to Access your Account" and a blue "Next" button.

10. If the token does not appear in your email in a timely manner, be sure to check the junk folder in your email account. If the token is not received or there is a need to generate a new token within the 60-minute window, then the token screen will look slightly different. Click the *Generate New Token* button for a new security code to be sent to the associated email.

This screenshot shows a similar "Secure Login" interface. The section title is "Enter Security Token" in green. The explanatory text is identical to the previous screen. However, a green message states: "A Security Token has been sent to your email account and will expire after 60 minutes." Below the "Enter Security Token" input field, there is a green "Generate New Token" button. The "Click Next to Access your Account" link and the blue "Next" button are still present on the right. At the bottom, additional text informs the user that the token may take a few minutes to arrive and provides instructions to click "Generate a New Token" if needed.

11. Once logged in, you will be directed to the Overview screen of the Broker Dashboard.

The screenshot displays the 'Overview' screen for a broker named Christa Smith. At the top, a header bar shows the user's name and a navigation menu with links: Overview, My Profile, My Clients, My Inbox, Documents, Address History, and Useful Links. Below the header, a status bar displays key information: State Unique ID: 2017EIT, License: EIT2017, Certification: S100140 (with a 'View' button), Expiration: 2019-03-29, and Status: Approved.

The main content area is divided into three sections:

- Messages & Notices:** A section titled 'Messages & Notices' with a 'collapse' button. It shows '1 of 1 messages' and a 'view all' link. Below is a table with columns: Notice Id, Subject, Type, and Date. A single message is listed with Notice Id 'Notice1025', Subject 'Welcome', Type 'Notice', and Date '03/29/2017'.
- Small Business Marketplace Notification:** A section titled 'Small Business Marketplace Notification' with a 'collapse' button. It includes tabs for 'Employer' and 'Employee', and sub-tabs for 'Renewal', 'Pending Termination', and 'Update Offer'. A 'Show 10 entries per page' dropdown and 'Previous/Next' navigation buttons are present. Below is a table with columns: Employer Account ID, Employer Name, Renewal Type, Renewal Date, Number of Employees enrolled, and Number of Employees not offered. The table is currently empty, displaying 'No data available in table' and 'Showing 0 to 0 of 0 entries'.
- Individual Marketplace Overview:** A section titled 'Individual Marketplace Overview' with a 'collapse' button. It includes tabs for 'Manual Renewal', 'Verification', 'Eligibility In-Progress', and 'Plan Selection In-Progress'. A 'Renewal end date range' dropdown is set to '-- Select --'. Below is a table with columns: Individual Account ID, Account Holder Name, Phone Number, and Renewal LSC End Date. The table is currently empty, displaying 'No data available in table' and 'Showing 0 to 0 of 0 entries'.

- The new Broker portal may look very different to how it was previously displayed. There is now additional functionality and resources available to Broker's in their respective portals. For additional information, view the "How to Navigate the Broker Portal" User Guide. Or, the associated webinar - *Agents and Broker Training: Small Business Marketplace Broker Portal Enhancements* using the following link - <https://info.nystateofhealth.ny.gov/news/agents-and-broker-training-small-business-marketplace-broker-portal-enhancements>