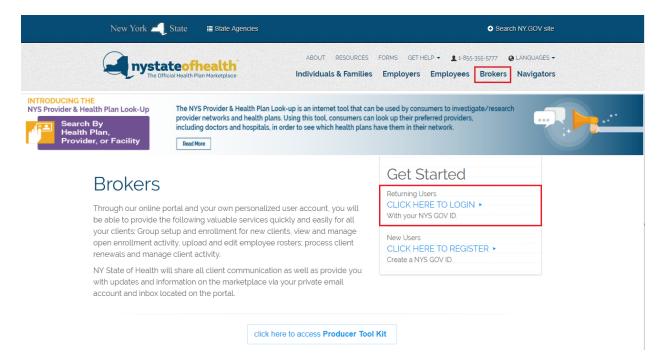
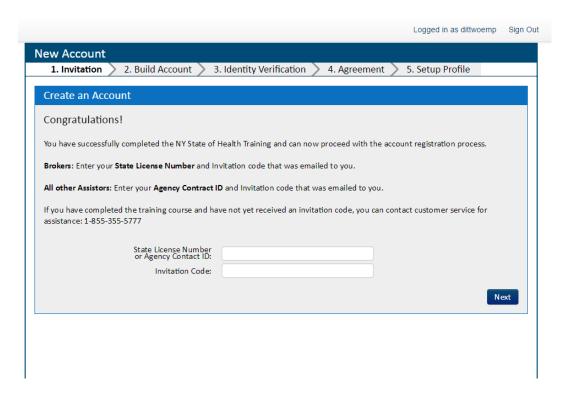
How to Create a Broker Account

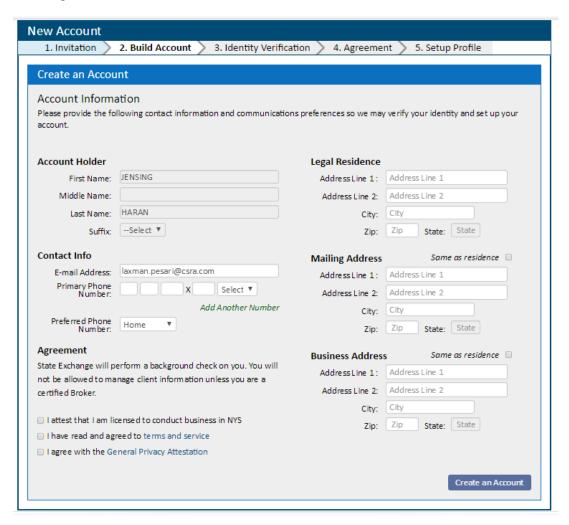
1. Once you have created your NY.gov ID and set your password (see the guide, "How to Create a NY.gov ID"), return to the Brokers tab from the NYSOH home page and select *CLICK HERE TO LOGIN*.



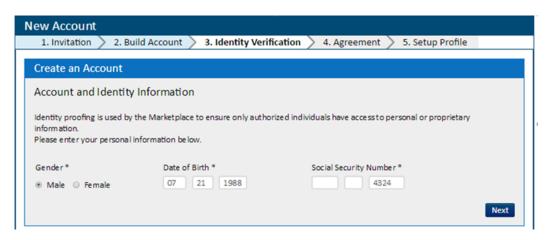
2. On the Create an Account page, enter your *Invitation Code* and your *License Number* and click *Next*.



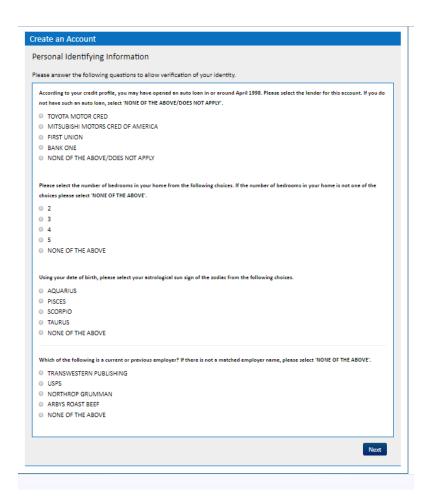
3. On the Build Account screen, First and Last name will populate based on the License Number and Invitation Code entered on the previous screen. Enter your Legal Residence (for identity proofing purposes) as well as other contact information such as Mailing Address, Business Address, and check the boxes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



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



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

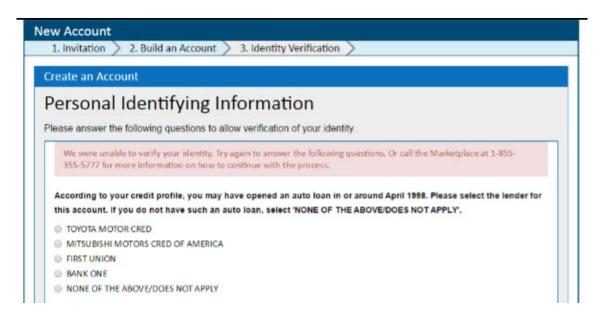


6. If the identity verification questions are successfully answered, a confirmation screen will appear. Click *Continue* to finish creating the account.

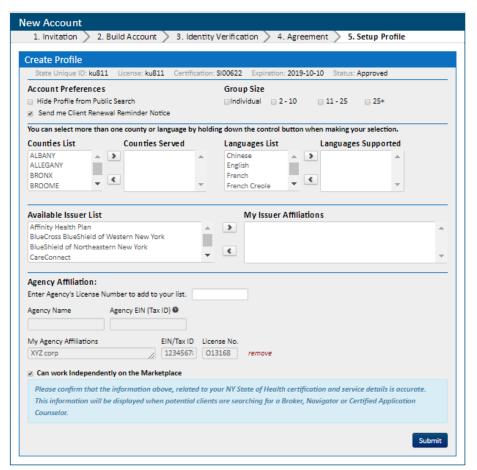


➤ If Identity Proofing is unsuccessful, the following message will display. Be sure that only personal information was entered and not the information for your business. Click *Close* and call the NYSOH Customer Service Center for additional help at 1-855-355-5777.

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.

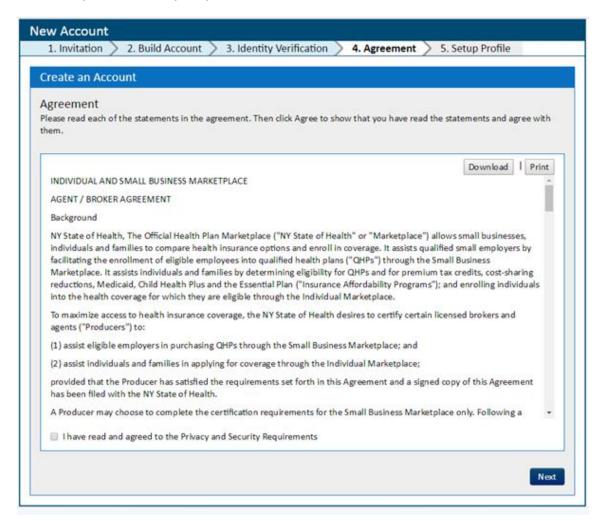


7. Next, is the Create Profile screen which is the final step of the Identity Proofing/Account Setup process.

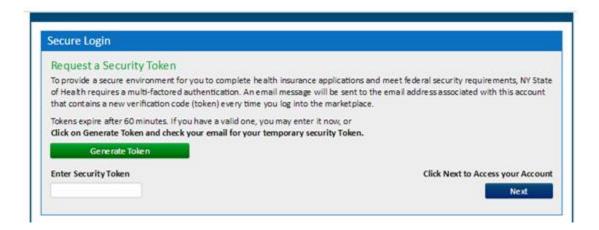


- In the top section, under Account Preferences, review the two checkboxes: "Hide Profile from Public Search" and "Send me Client Renewal Reminder Notice." Checking "Hide Profile from Public Search" will eliminate you from the public search tool as a Broker in your area. This must be manually checked 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 Size*s 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.

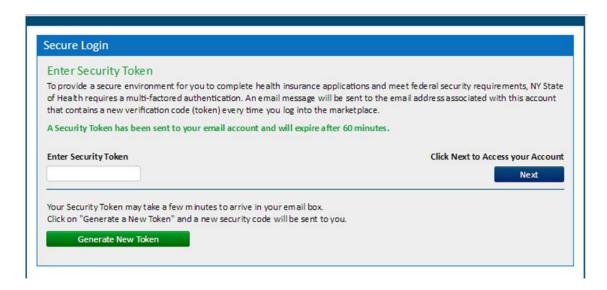
8. On the Agreement screen, review the Individual and Small Business Marketplace Broker Agreement. You may also *print* or *download* the document to have a copy for your records by clicking the corresponding button in the upper righthand corner of the screen. Click the checkbox that says you have read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



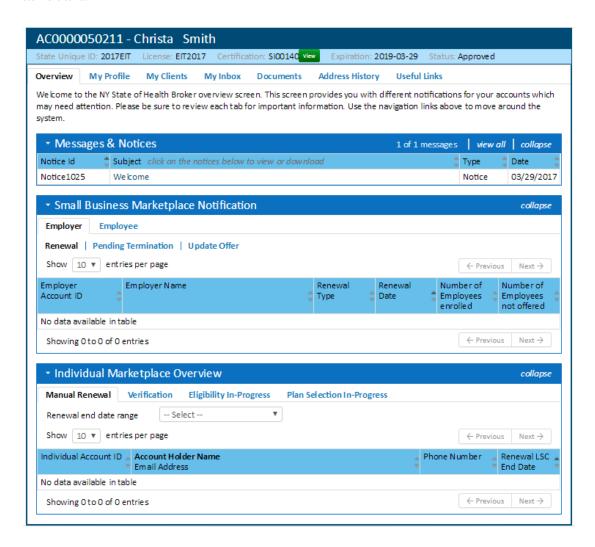
- 9. After successfully passing Identity Proofing, you will be prompted to generate a token. Click the green *Generate Token* button. This token will be sent to the email entered when creating your NY.gov ID. After retrieving this token from your email, copy and paste it into the *Enter Security Token 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.



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.



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



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