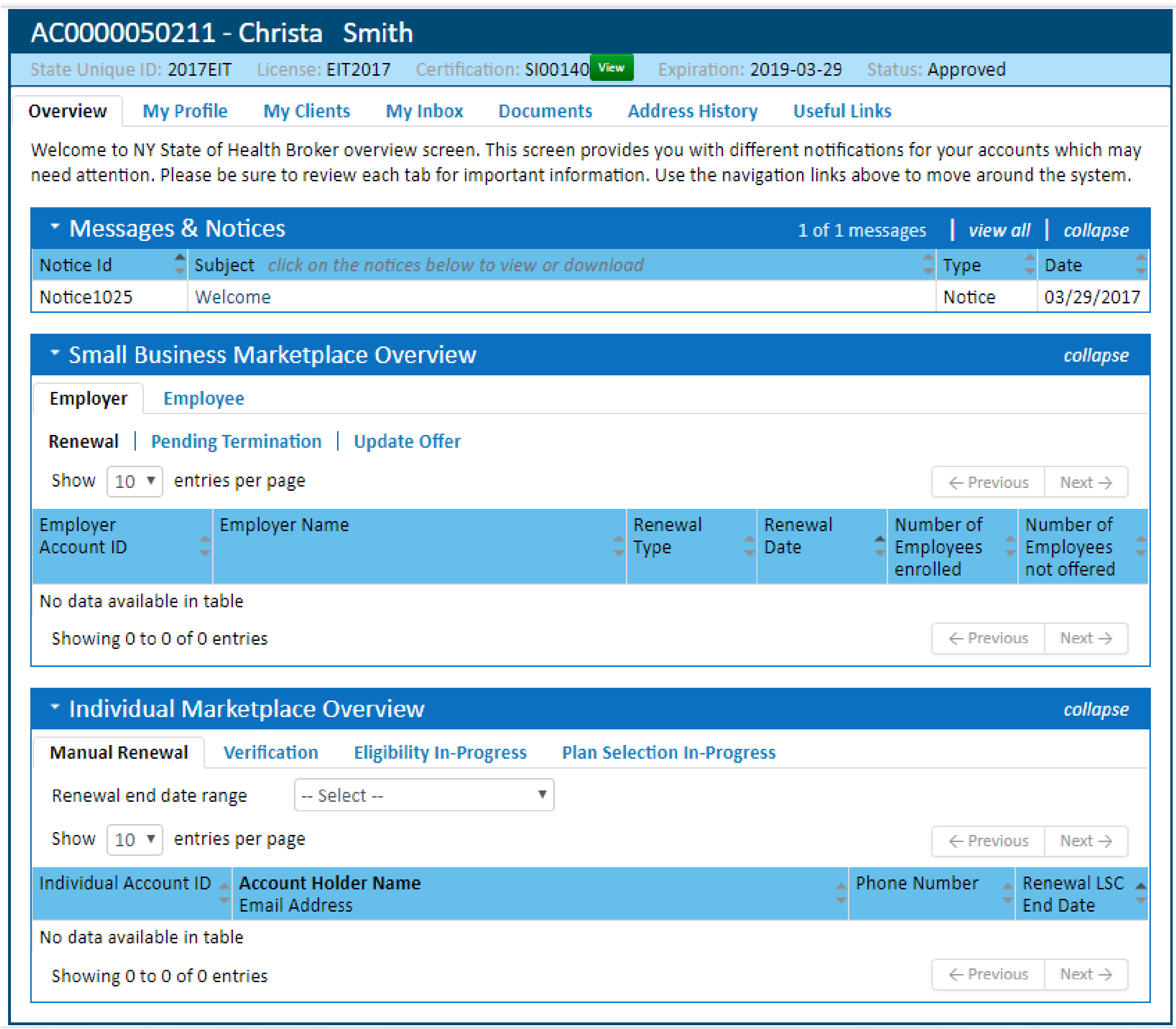
How to Navigate the Broker Portal

This User Guide is designed to give Brokers a better understanding of how to maximize the use of their Broker Portal.

After logging into the Broker Portal from the main NYSOH screen, you will be directed to the Broker Portal Overview screen. This screen is one of seven tabs listed across the top of the page.

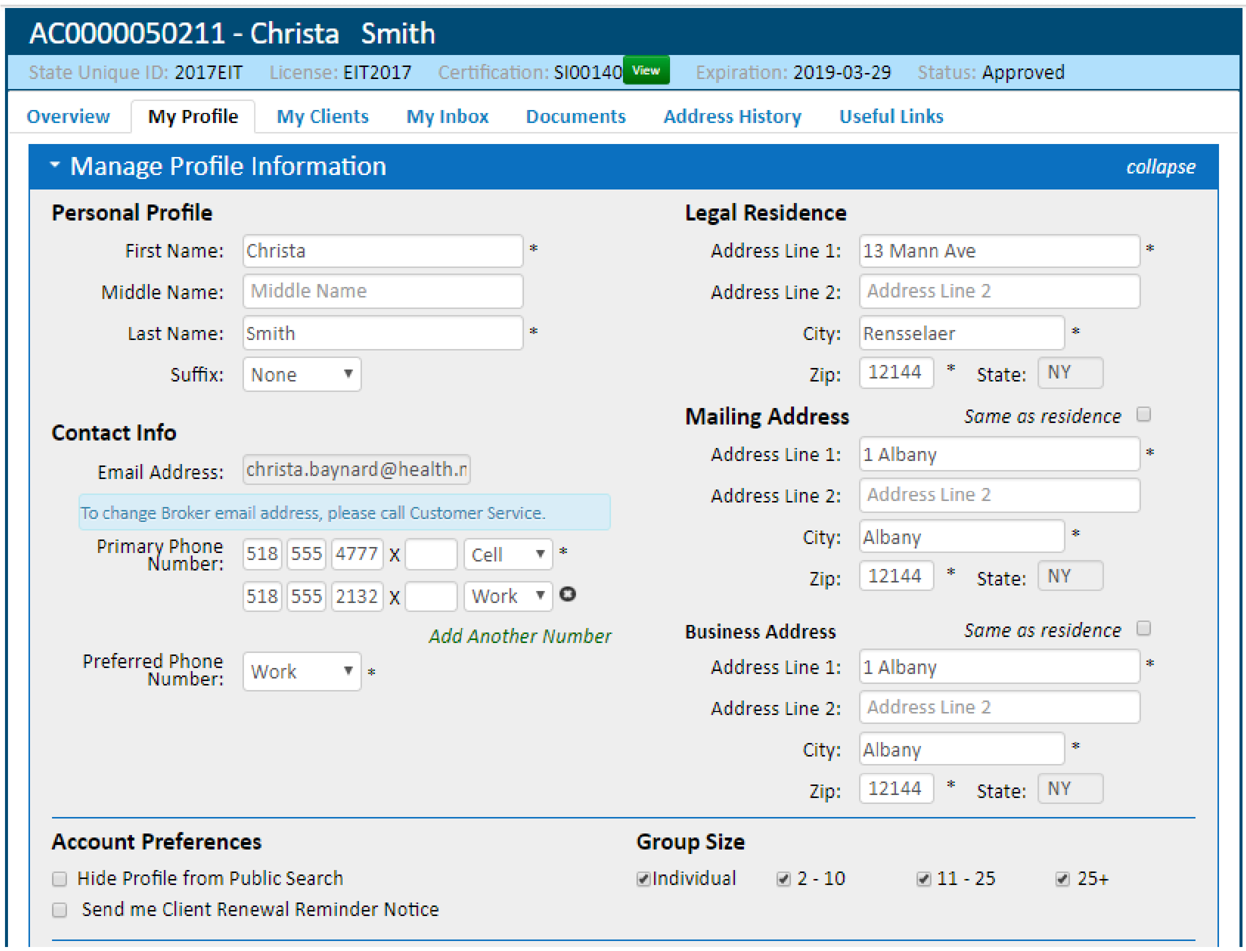
- The blue sections at the top of the screen are the Broker's Account Number, State Unique ID, License Number, Certification Number, Expiration Date and the broker's Status with the NYSOH.
    - The NYSOH Certification is printable by clicking the green View button. Follow the directions on the screen to print the Certification.
- The Tabs across the top of the screen will assist in navigating from screen to screen.



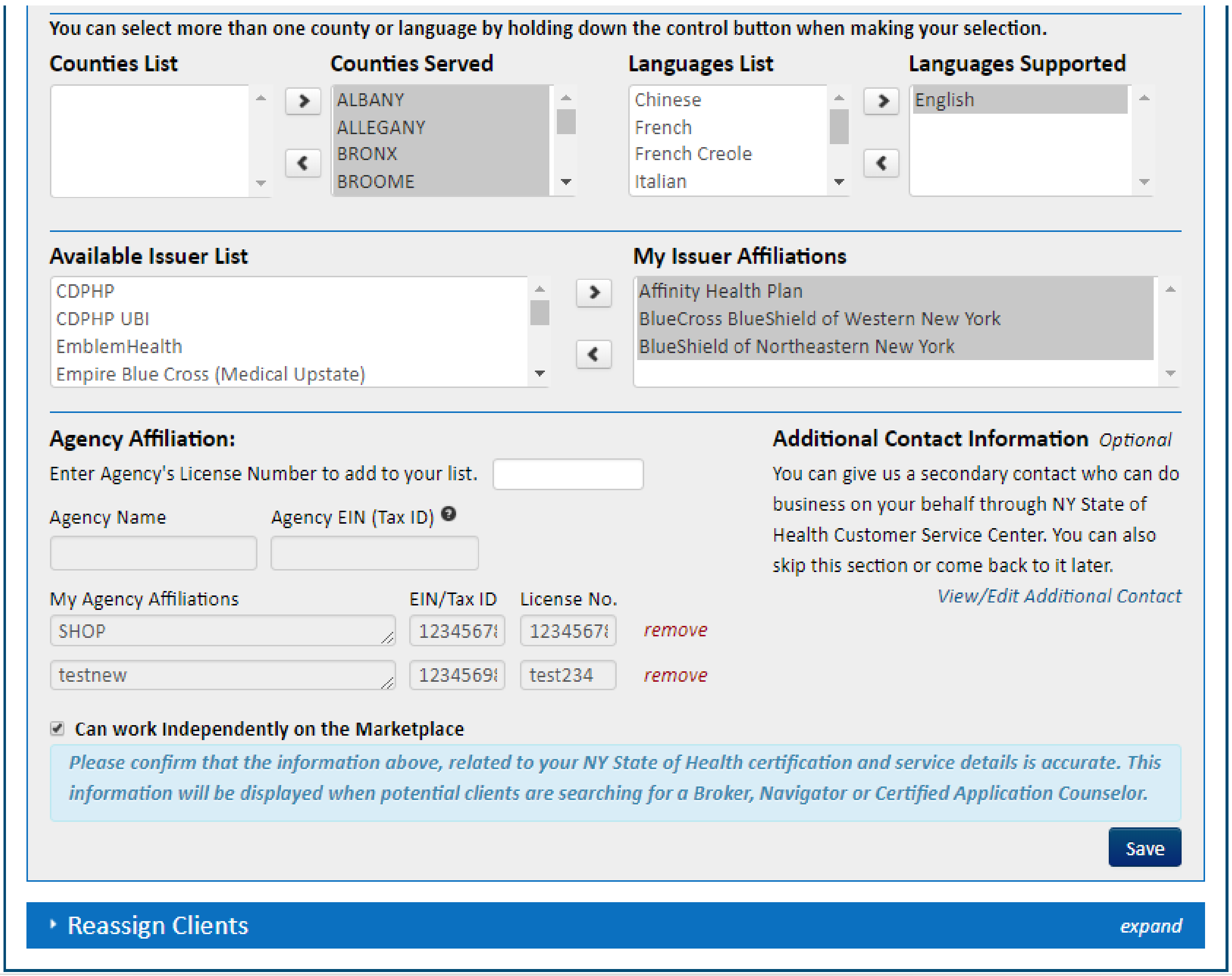
The **Overview** screen is the tab that will appear after logging in each time. There are three (3) section on the screen which always appear expanded but can be collapsed by clicking on the small triangle to the left of the section title.

- *Messages and Notices* section will display the most recent notices that in the Broker's inbox. The full notice list can be found in the My Inbox tab.
- *Small Business Marketplace Overview* section displays the Employer's coming up for Renewal (rolling off), Employer's Pending Termination and Update Offer (which is currently not active).
- *Individual Marketplace Overview* section displays Individuals who are up for renewal Manually, those awaiting Verification, Individuals whose Eligibility is in Progress and Individuals who are in Progress of Plan Selection.

The **My Profile** tab allows Broker's to manage their personal and professional information. Email Address cannot be changed here, users must contact the NYSOH Customer Service Center for Email Address changes.

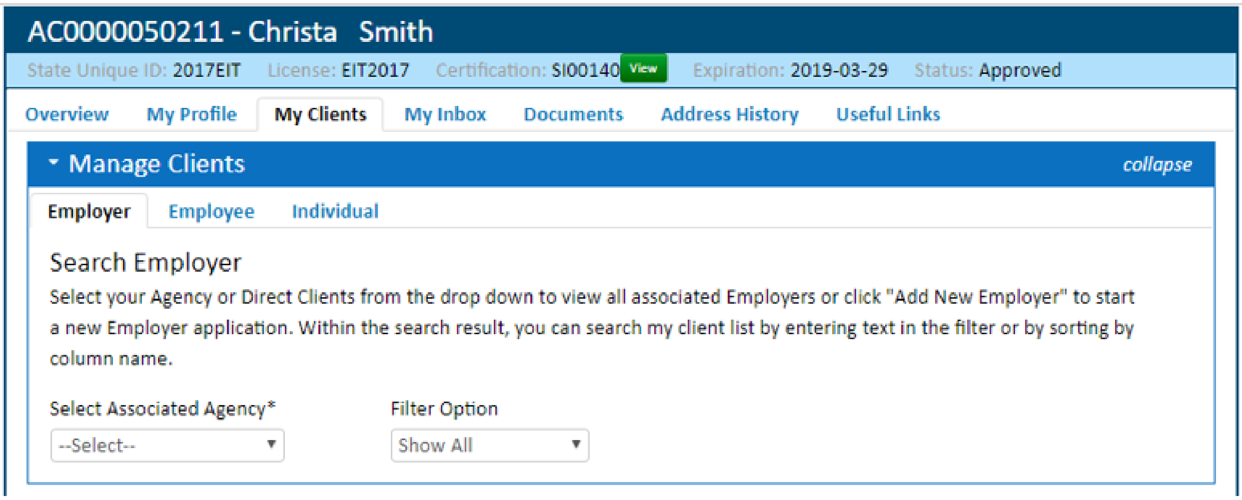


The bottom of the My Profile tab is used to set the parameters in which Brokers will appear in the public search.

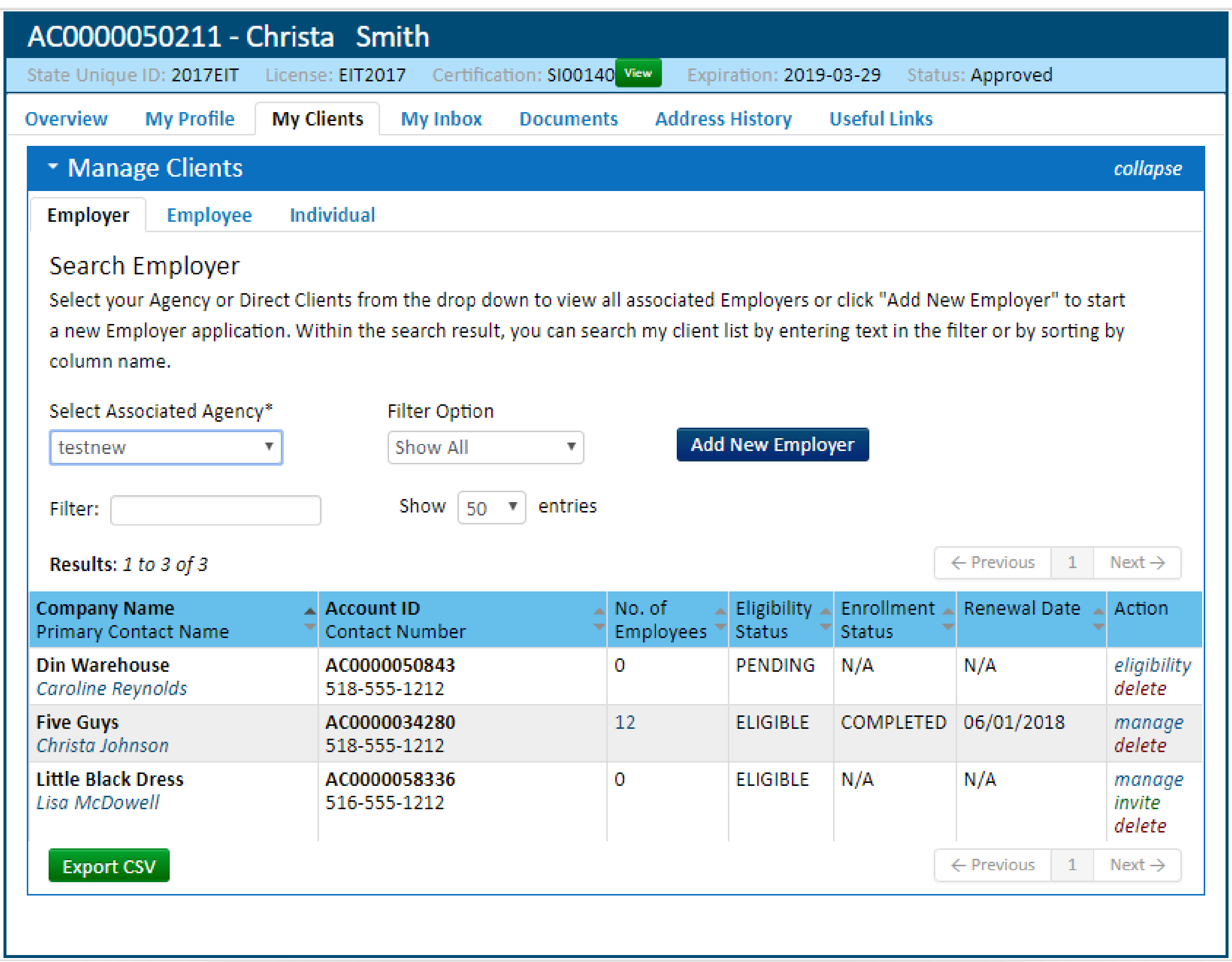


- *Agency Affiliation* allows Broker's to add multiple Agencies and select which Agency the Business or Individual will be allocated under.
- *Additional Contact* is currently not operational.
- *Reassign Clients* is a collapsed section at the bottom. Click the header to expand the section and reassign clients from one Agency to another, or under no agency at all. See the User Guide "How to Reassign Clients" to learn more.

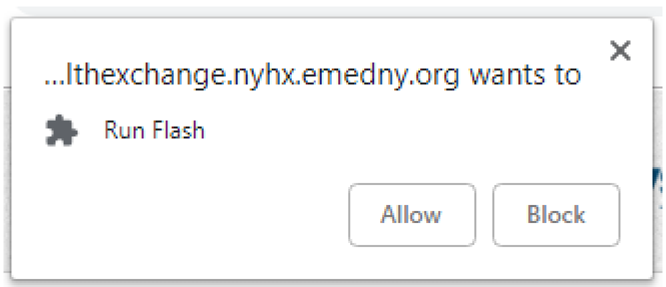
The **My Clients** tab is where all Employer and Individual clients may be added, managed and deleted.



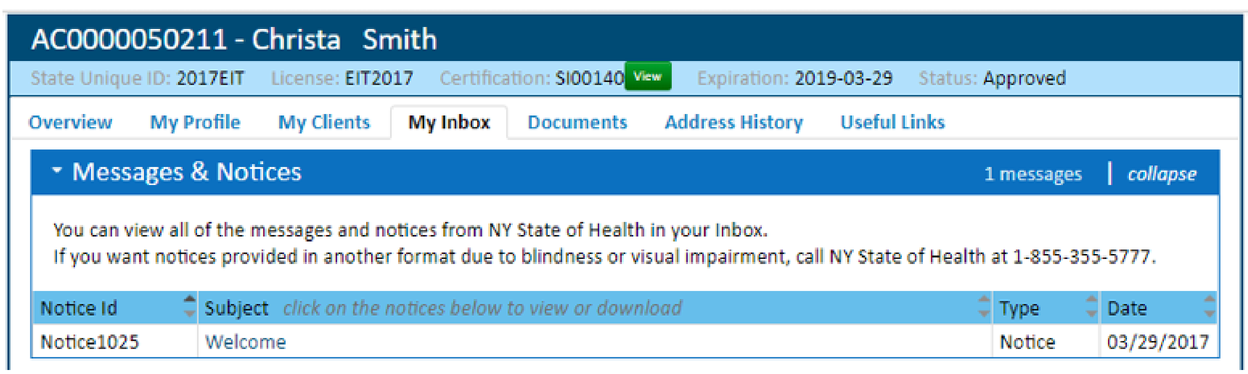
- The *Manage Clients* section allows the User to select which type of client they'd like to search – Employer, Employee or Individual.
- Select the *Associated Agency* or select *Direct Clients* for those not affiliated with an Agency. Once selected, a list of clients will generate specific to the client type and affiliation selected.



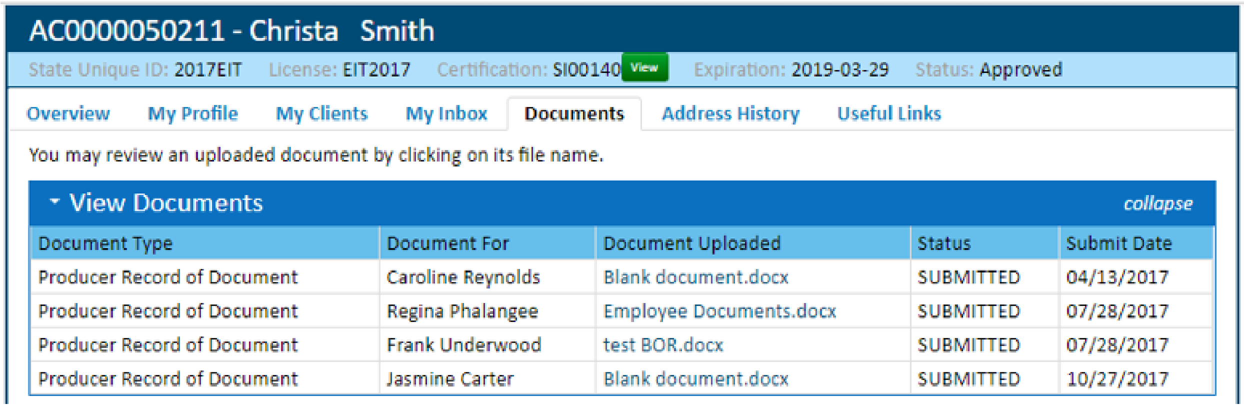
- To add a new employer, click the blue *Add New Employer* button. For additional information on adding a new employer and completing the Eligibility Determination Form, see the "Adding a New Group & Navigation After 4/1/18" User Guide.
- The list of clients that is displayed can be filtered by free typing search criteria into the *Filter* field. It can also be filtered by using the arrows within the headers of each column.
- To print the complete list of the currently displayed clients, click the green *Export CSV* button. If the button is not present but there is a small puzzle piece in its place, click the puzzle piece. The system will ask if you want to run the widget, click allow and the button will appear.



My Inbox will display all Notices that pertain only to the Broker. Notices pertaining to Individuals and Businesses or their Employees can be found in their respective portals. To read a message, simply click the Subject. Notices can also be sorted by clicking on the arrows within the headers of each column.



The **Documents** tab displays documents that have been uploaded to the NYSOH for a Brokers' Employer and Individual clients.


AC0000050211 - Christa Smith

State Unique ID: 2017EIT License: EIT2017 Certification: SI00140 View Expiration: 2019-03-29 Status: Approved

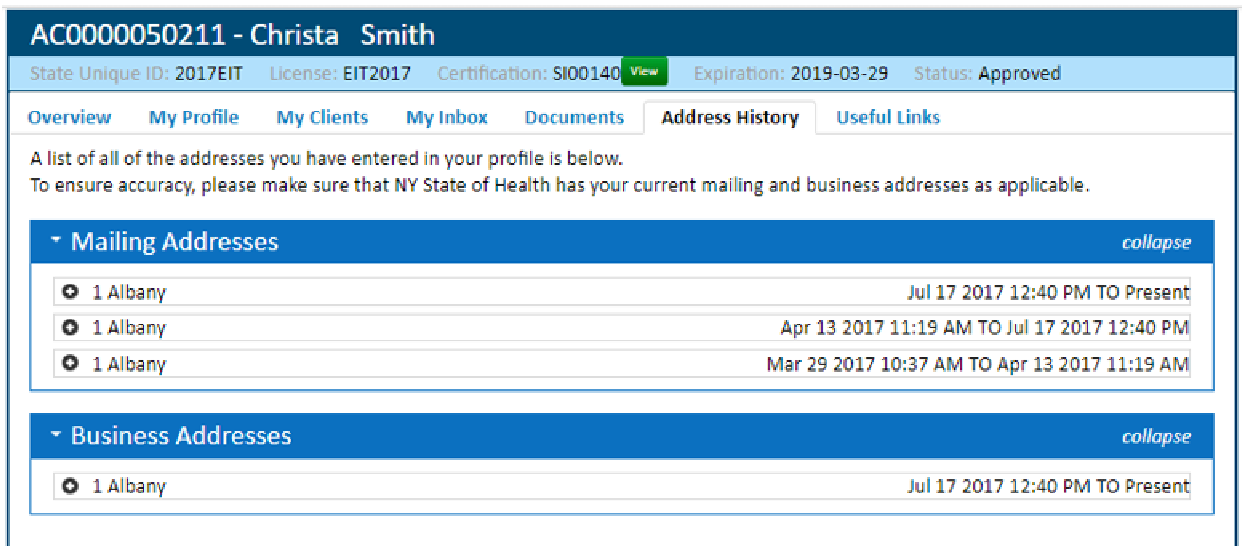
Overview My Profile My Clients My Inbox Documents Address History Useful Links

You may review an uploaded document by clicking on its file name.

View Documents collapse

Document Type	Document For	Document Uploaded	Status	Submit Date
Producer Record of Document	Caroline Reynolds	Blank document.docx	SUBMITTED	04/13/2017
Producer Record of Document	Regina Phalangee	Employee Documents.docx	SUBMITTED	07/28/2017
Producer Record of Document	Frank Underwood	test BOR.docx	SUBMITTED	07/28/2017
Producer Record of Document	Jasmine Carter	Blank document.docx	SUBMITTED	10/27/2017

The **Address History** tab displays all current and previous addresses associated with the Broker's Portal. If an Address needs to be updated, it must be done from the *My Profile* tab.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Overview My Profile My Clients My Inbox Documents Address History Useful Links

A list of all of the addresses you have entered in your profile is below.
To ensure accuracy, please make sure that NY State of Health has your current mailing and business addresses as applicable.

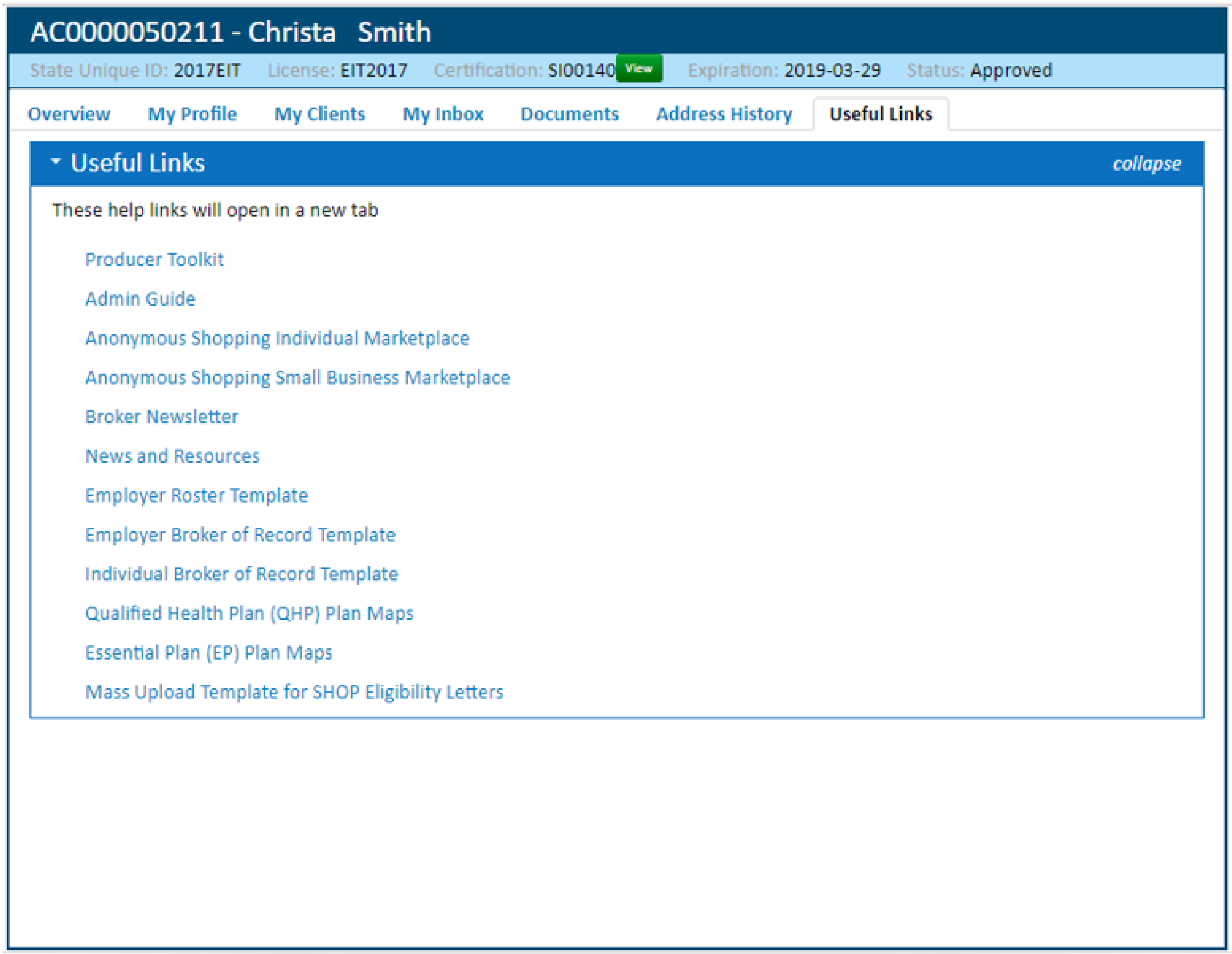
Mailing Addresses collapse

1 Albany Jul 17 2017 12:40 PM TO Present
1 Albany Apr 13 2017 11:19 AM TO Jul 17 2017 12:40 PM
1 Albany Mar 29 2017 10:37 AM TO Apr 13 2017 11:19 AM

Business Addresses collapse

1 Albany Jul 17 2017 12:40 PM TO Present

Lastly, the **Useful Links** tab includes everything a Broker may need to assist Small Business and Individual clients. When a link is clicked, a new window will open with the desired information.



- *Producer Toolkit* will open a new window to access the Toolkit.
- Admin Guide will display the Admin Guides posted in the Toolkit.
- *Anonymous Shopping Individual Marketplace* will open a new window to the Individual Marketplace's Anonymous Shopping Tool. This tool is only used for Individual clientele.
- *Anonymous Shopping Small Business Marketplace* - This tool is only used for SBM clientele to view Certified SHOP plans.
- *Broker Newsletter* will display all Broker Newsletters ever posted.
- *News and Resources* will open a new window to the NYSOH Resources page.
- *Employer Roster Template* is the template used to upload multiple Employees to a Legacy Employer account. This can still be used for active Legacy Employer Groups with multiple New Hires.
- *Employer Broker of Record Template* and *Individual Broker of Record Template* are BOR for their respective clientele.

- *Qualified Health Plan (QHP) Plan Maps* will open to an interactive map of NYS broken down by county. Simply click the county name to see the list of QHP's available.
- *Essential Plan (EP) Plan Maps* opens to an interactive map broken down by county. Simply click the county name to see a list of EP plans available.
- *Mass Upload Template* is used for the Small Business Marketplace. This spreadsheet is used to complete a mass upload of 20 or more groups to determine eligibility. Once the template is complete, email the template to the address on the spreadsheet. Accounts will be created for the groups entered and an Eligibility Determination will appear in the respective accounts.