

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.

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

Welcome to NY State of Health Broker overview screen. This screen provides you with different notifications for your accounts which may need attention. Please be sure to review each tab for important information. Use the navigation links above to move around the system.

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

Notice Id	Subject <i>click on the notices below to view or download</i>	Type	Date
Notice1025	Welcome	Notice	03/29/2017

Small Business Marketplace Overview [collapse](#)

Employer Employee

Renewal Pending Termination Update Offer

Show 10 entries per page [← Previous](#) [Next →](#)

Employer Account ID	Employer Name	Renewal Type	Renewal Date	Number of Employees enrolled	Number of Employees not offered
No data available in table					

Showing 0 to 0 of 0 entries [← Previous](#) [Next →](#)

Individual Marketplace Overview [collapse](#)

Manual Renewal Verification Eligibility In-Progress Plan Selection In-Progress

Renewal end date range -- Select --

Show 10 entries per page [← Previous](#) [Next →](#)

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

Showing 0 to 0 of 0 entries [← Previous](#) [Next →](#)

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.

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

▾ Manage Profile Information collapse

Personal Profile

First Name: *

Middle Name:

Last Name: *

Suffix:

Contact Info

Email Address:

To change Broker email address, please call Customer Service.

Primary Phone Number: X *

X

Preferred Phone Number: *

Add Another Number

Legal Residence

Address Line 1: *

Address Line 2:

City: *

Zip: * State:

Mailing Address Same as residence ☐

Address Line 1: *

Address Line 2:

City: *

Zip: * State:

Business Address Same as residence ☐

Address Line 1: *

Address Line 2:

City: *

Zip: * State:

Account Preferences

☐ Hide Profile from Public Search

☐ Send me Client Renewal Reminder Notice

Group Size

☒ Individual ☒ 2 - 10 ☒ 11 - 25 ☒ 25+

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

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 French French Creole Italian	English

Available Issuer List	My Issuer Affiliations
CDPHP CDPHP UBI EmblemHealth Empire Blue Cross (Medical Upstate)	Affinity Health Plan BlueCross BlueShield of Western New York BlueShield of Northeastern New York

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.	
SHOP	1234567	1234567	remove
testnew	1234569	test234	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.

Save

Additional Contact Information *Optional*

You can give us a secondary contact who can do business on your behalf through NY State of Health Customer Service Center. You can also skip this section or come back to it later.

[View/Edit Additional Contact](#)

▸ Reassign Clients

expand

- *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.

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Overview
My Profile
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Manage Clients
collapse

Employer
Employee
Individual

Search Employer

Select your Agency or Direct Clients from the drop down to view all associated Employers or click "Add New Employer" to start a new Employer application. Within the search result, you can search my client list by entering text in the filter or by sorting by column name.

Select Associated Agency*
Filter Option

--Select--
Show All

- 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.

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Select Associated Agency*
Filter Option

testnew
Show All

Add New Employer

Filter:
Show 50 entries

Results: 1 to 3 of 3

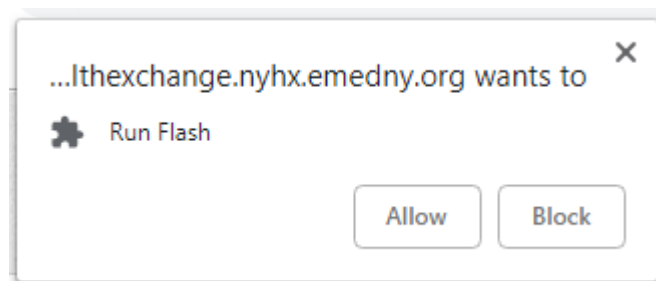
← Previous
1
Next →

Company Name Primary Contact Name	Account ID Contact Number	No. of Employees	Eligibility Status	Enrollment Status	Renewal Date	Action
Din Warehouse Caroline Reynolds	AC0000050843 518-555-1212	0	PENDING	N/A	N/A	eligibility delete
Five Guys Christa Johnson	AC0000034280 518-555-1212	12	ELIGIBLE	COMPLETED	06/01/2018	manage delete
Little Black Dress Lisa McDowell	AC0000058336 516-555-1212	0	ELIGIBLE	N/A	N/A	manage invite delete

Export CSV

← Previous
1
Next →

- 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.

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

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

You can view all of the messages and notices from NY State of Health in your Inbox.

If you want notices provided in another format due to blindness or visual impairment, call NY State of Health at 1-855-355-5777.

Notice Id	Subject <small>click on the notices below to view or download</small>	Type	Date
Notice1025	Welcome	Notice	03/29/2017

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

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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.

The screenshot shows a user interface for a user named Christa Smith (ID: AC0000050211). The top navigation bar includes tabs for Overview, My Profile, My Clients, My Inbox, Documents, Address History, and Useful Links. The Useful Links tab is active, displaying a list of links that will open in a new tab. The links are: Producer Toolkit, Admin Guide, Anonymous Shopping Individual Marketplace, Anonymous Shopping Small Business Marketplace, Broker Newsletter, News and Resources, Employer Roster Template, Employer Broker of Record Template, Individual Broker of Record Template, Qualified Health Plan (QHP) Plan Maps, Essential Plan (EP) Plan Maps, and Mass Upload Template for SHOP Eligibility Letters. A 'collapse' button is visible in the top right corner of the Useful Links section.

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

Useful Links collapse

These help links will open in a new tab

- [Producer Toolkit](#)
- [Admin Guide](#)
- [Anonymous Shopping Individual Marketplace](#)
- [Anonymous Shopping Small Business Marketplace](#)
- [Broker Newsletter](#)
- [News and Resources](#)
- [Employer Roster Template](#)
- [Employer Broker of Record Template](#)
- [Individual Broker of Record Template](#)
- [Qualified Health Plan \(QHP\) Plan Maps](#)
- [Essential Plan \(EP\) Plan Maps](#)
- [Mass Upload Template for SHOP Eligibility Letters](#)

- *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.