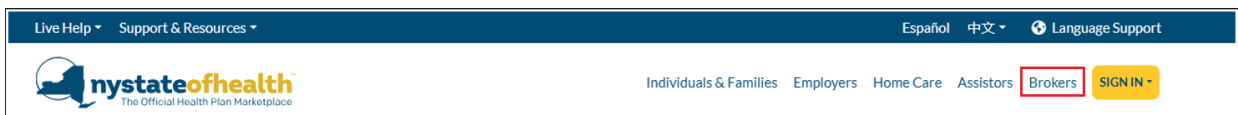


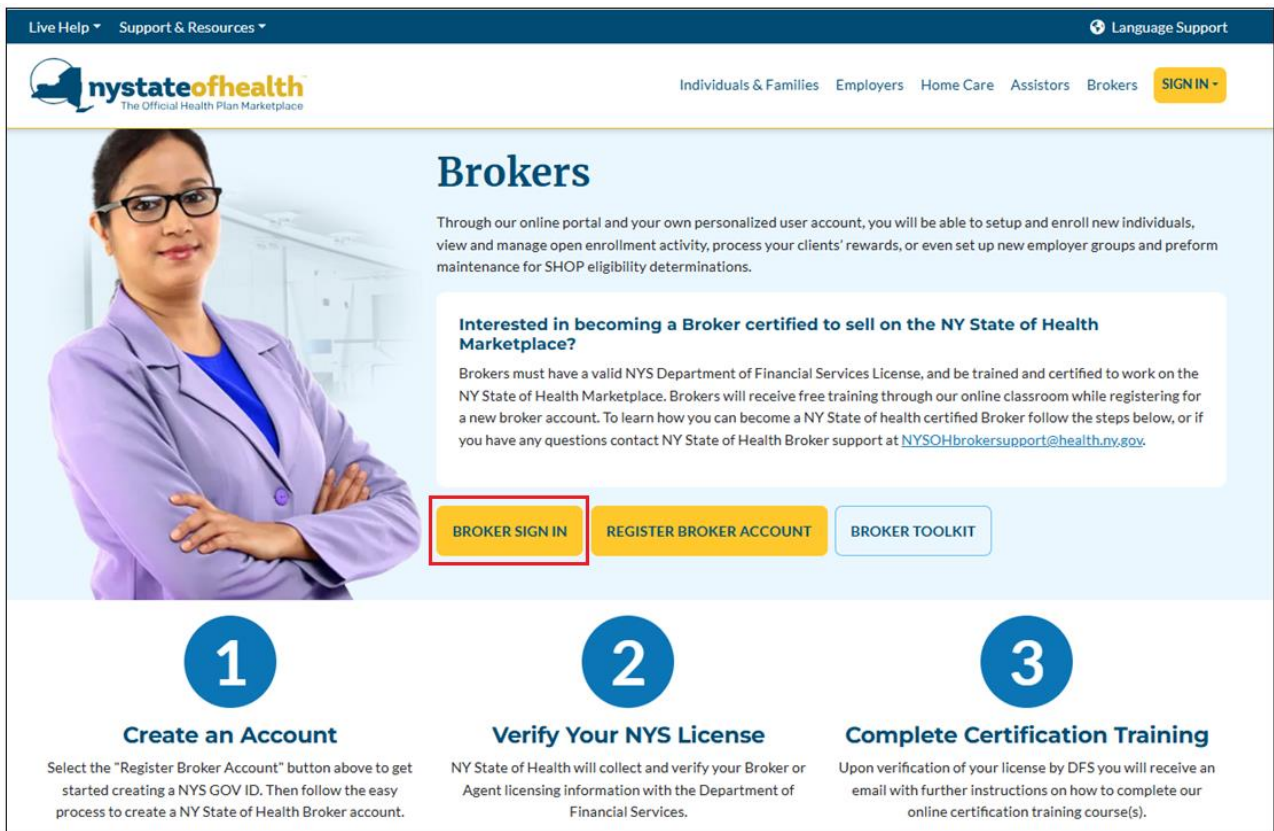
NYSOH Broker Certification – Step 4: Profile Setup

After the Certification Courses are completed, it could take up to 2-3 days for the account to update with the completed status. If you log in after 3 days and are still not able to proceed, reach out to the Broker Support Mailbox directly at NYSOHbrokersupport@health.ny.gov.

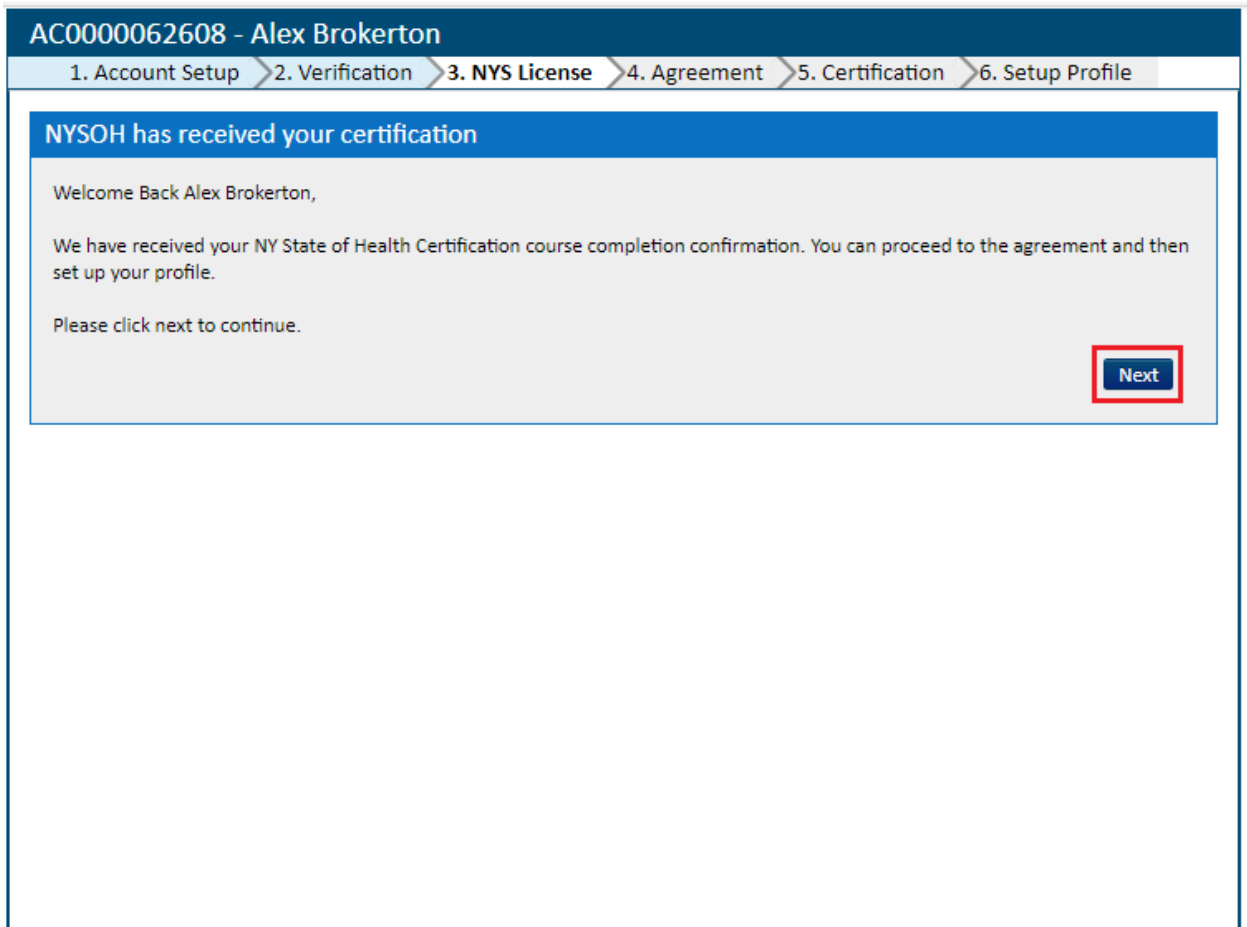
1. Once the Certification Training courses are completed, log in to <https://nystateofhealth.ny.gov>. Click **Brokers** in the upper right-hand corner.



2. On the Broker Portal sign-on page, click the **Broker Sign In** button with the Broker NY.Gov ID.

A screenshot of the NYSOH Broker Portal sign-on page. The page has a dark blue header with 'Live Help', 'Support & Resources', and 'Language Support' links. Below the header is the NYSOH logo and navigation links for 'Individuals & Families', 'Employers', 'Home Care', 'Assistors', 'Brokers', and a yellow 'SIGN IN' button. The main content area features a large image of a woman in a purple blazer on the left. To her right, the heading 'Brokers' is displayed in large blue font. Below the heading is a paragraph of text: 'Through our online portal and your own personalized user account, you will be able to setup and enroll new individuals, view and manage open enrollment activity, process your clients' rewards, or even set up new employer groups and preform maintenance for SHOP eligibility determinations.' Below this text is a white box with the heading 'Interested in becoming a Broker certified to sell on the NY State of Health Marketplace?' and a paragraph of text: 'Brokers must have a valid NYS Department of Financial Services License, and be trained and certified to work on the NY State of Health Marketplace. Brokers will receive free training through our online classroom while registering for a new broker account. To learn how you can become a NY State of health certified Broker follow the steps below, or if you have any questions contact NY State of Health Broker support at NYSOHbrokersupport@health.ny.gov.' Below this text are three buttons: 'BROKER SIGN IN' (highlighted with a red box), 'REGISTER BROKER ACCOUNT' (yellow), and 'BROKER TOOLKIT' (light blue). At the bottom of the page, there are three numbered steps: 1. 'Create an Account' with the instruction 'Select the "Register Broker Account" button above to get started creating a NYS GOV ID. Then follow the easy process to create a NY State of Health Broker account.' 2. 'Verify Your NYS License' with the instruction 'NY State of Health will collect and verify your Broker or Agent licensing information with the Department of Financial Services.' 3. 'Complete Certification Training' with the instruction 'Upon verification of your license by DFS you will receive an email with further instructions on how to complete our online certification training course(s).'

3. After logging in, generate the token to proceed to the account. A *Welcome Back* screen appears to continue creating the Broker Profile. Click **Next**.



The screenshot displays a web interface for a user named Alex Brokerton. At the top, a dark blue header bar contains the account number 'AC0000062608 - Alex Brokerton'. Below this, a light blue navigation bar shows a progress indicator with six steps: '1. Account Setup', '2. Verification', '3. NYS License', '4. Agreement', '5. Certification', and '6. Setup Profile'. The main content area features a blue header that reads 'NYSOH has received your certification'. The body text includes a welcome message, a confirmation of course completion, and a prompt to click 'Next'. A blue 'Next' button is located in the bottom right corner of the main content area, highlighted with a red rectangular border.

- Please note the newly generated Account Number (AC#) along with the Broker Name in the blue bar along the top of the screen.

4. The next step is the *Broker Agreement*. The agreement applies to both the Small Business and Individual Marketplaces.
 - Click the **Download** or **Print** buttons in the upper right-hand corner to download/print.
 - **Check the box** at the bottom of the Agreement that you have read and agree to the Privacy and Security Requirements.
 - Click **Next**.

AC0000062608 - Alex Brokerton

1. Account Setup > 2. Verification > 3. NYS License > **4. Agreement** > 5. Certification > 6. Setup Profile

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;

I have read and agreed to the Privacy and Security Requirements

Next

- Please note: the Broker Agreement can also be found in the Broker Support section of the Broker Tool Kit.

5. Next is the *Congratulations* screen. This screen provides the NYSOH Broker Certification Number. It will begin with **SX** if only certified for the Small Business Marketplace or **SI** if certified in both the Small Business and Individual Marketplaces. It also includes the Certification Expiration date (this is when you will recertify).
- Click the **View/Print Certification** button to view or print this certification. This can also be done at any time from the Broker's dashboard.
 - Click **Continue** to proceed.

AC0000062608 - Alex Brokerton

1. Account Setup > 2. Verification > 3. NYS License > 4. Agreement > 5. **Certification** > 6. Setup Profile

Certification

Congratulations!


You are authorized to conduct business on NY State of Health.

Name: ALEX BROKERTON

Certification Number: SI00303

Certification Expiration Date: 2022-08-05

Certified By:



View / Print Certification **Continue**

6. Next, is the *Create Profile* screen which is the final step of the 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 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 currently work with an agency, or do not wish to 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.

Create Profile

State Unique ID: 234567 License: 23456780 Certification: S100303 Expiration: 2022-08-05 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

- WAYNE
- WESTCHESTER
- WYOMING
- YATES

Counties Served

- ALBANY
- COLUMBIA
- DUTCHESS
- MONTGOMERY

Languages List

- French Creole
- Italian
- Korean
- Russian

Languages Supported

- English
- Spanish

Available Issuer List

- BlueCross BlueShield of Western New York
- Independent Health
- MetroPlus Health Plan
- Today's Options of New York

My Issuer Affiliations

- BlueShield of Northeastern New York
- CDPHP
- CDPHP UBI
- EmblemHealth

Agency Affiliation:

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

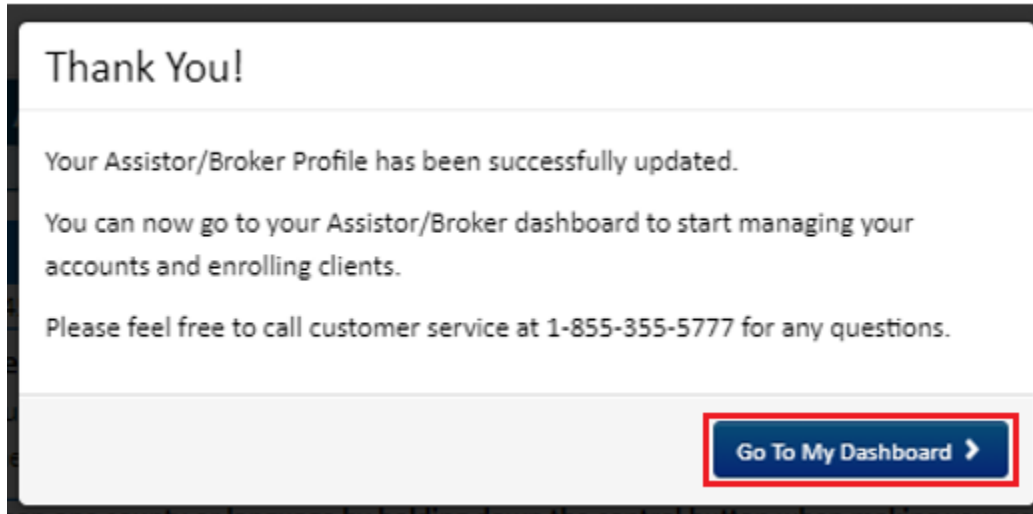
Agency Name Agency EIN (Tax ID) Add

- 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

CONGRATULATIONS! Your Broker account and profile have been completed. A message appears that you can now proceed to your dashboard and start enrolling clients. For questions, contact our Customer Support at 1-855-355-5777 or contact the Broker BML mailbox at NYSOHbrokersupport@health.ny.gov.



***Continue to the next user guide:
“How to Navigate the Broker Portal”
to learn about the functions within the Broker dashboard.**