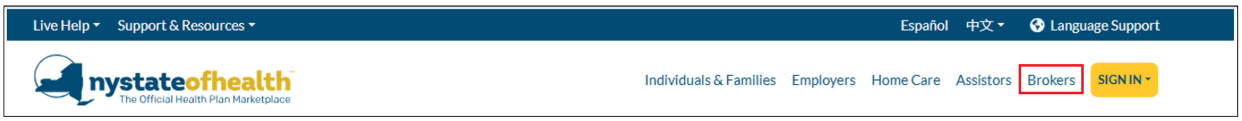
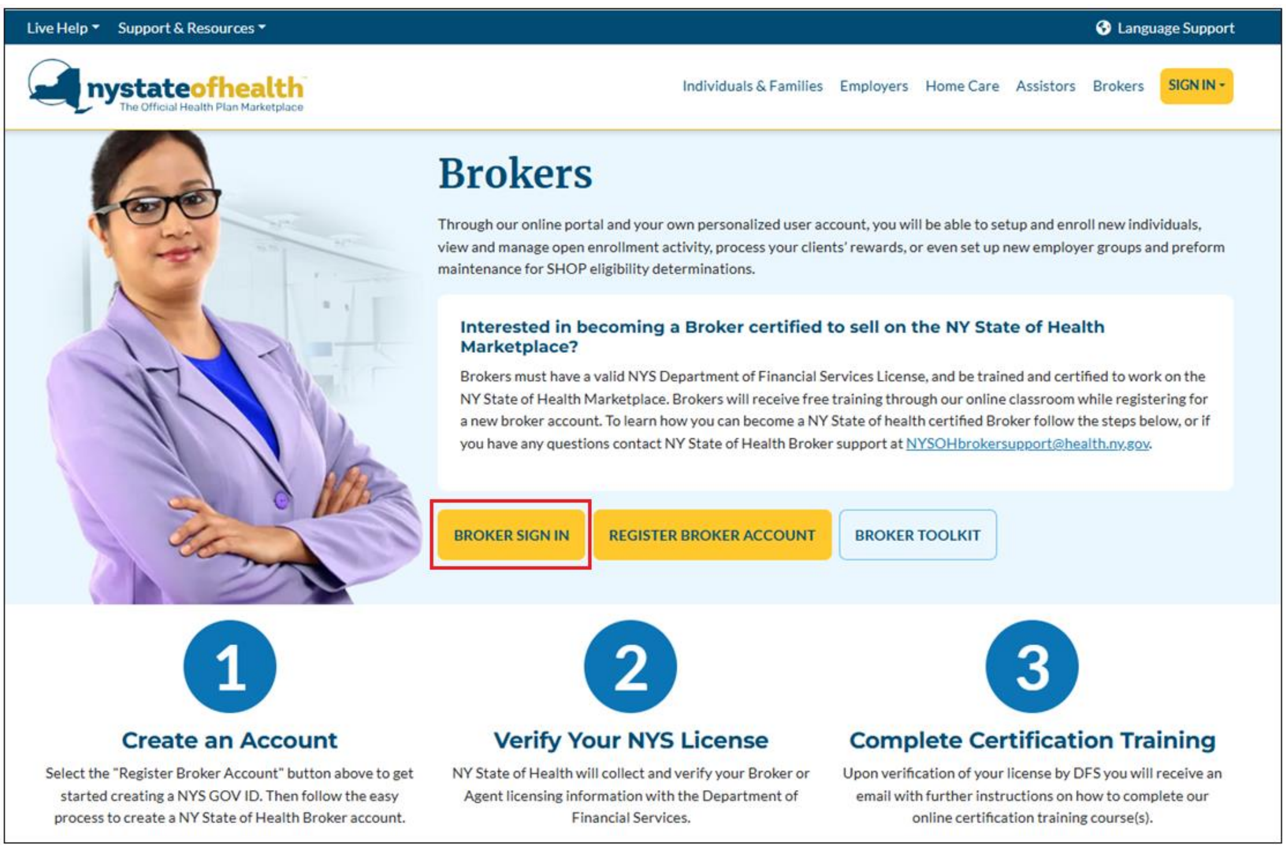
How to Navigate the Broker Portal

This user guide is designed to better assist a Broker's understanding of navigating their Broker Portal and how to maximize the use of their dashboard.

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

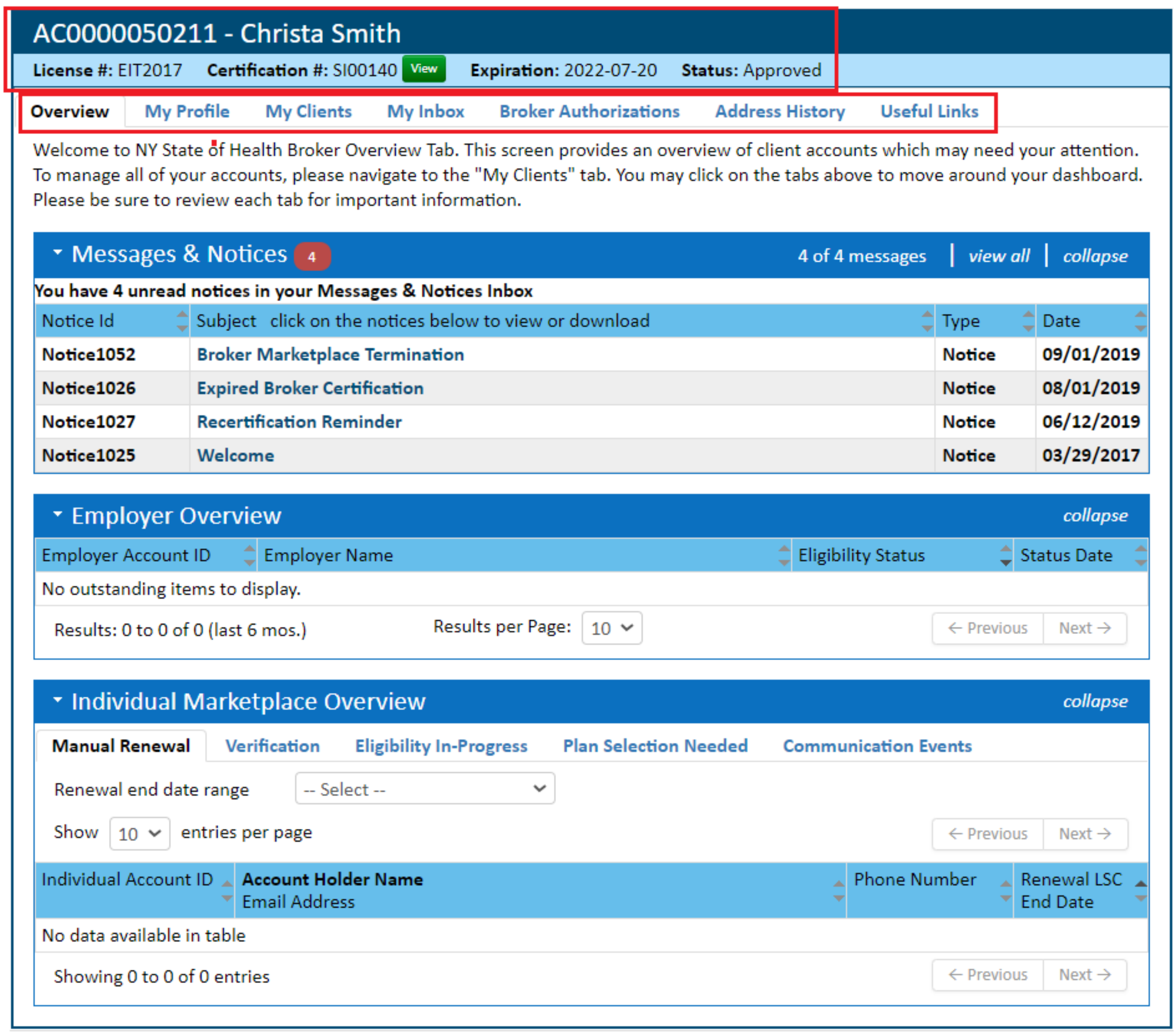


2. On the Broker Portal sign-on page, click the **Broker Sign In** button with the newly created NY.Gov ID..



3. Once logged into the Broker Portal from the main NYSOH screen, the Broker *Overview* page displays. This page is one of seven tabs listed across the top of the screen.

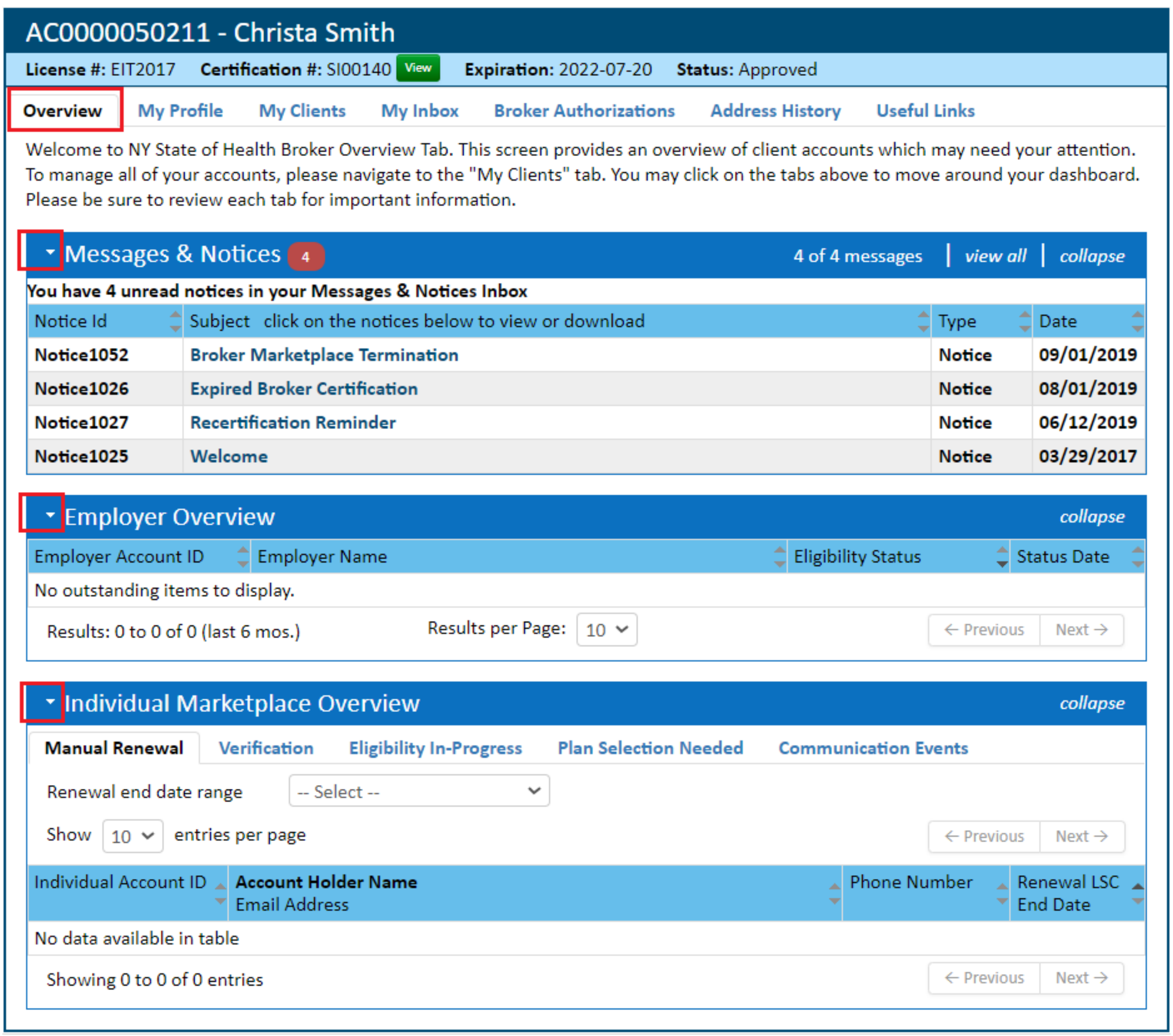
   - The blue sections at the top of the screen contain the Broker's Account Number (AC#), License Number, NYSOH Certification Number, Expiration Date of NYSOH Certification, and the Broker's Status with the NYSOH.
     - The NYSOH Certification is printable by clicking the green View button. Follow the directions on the screen to print the Certification.
   - The tabs across the top of the screen will assist in navigating from page to page.



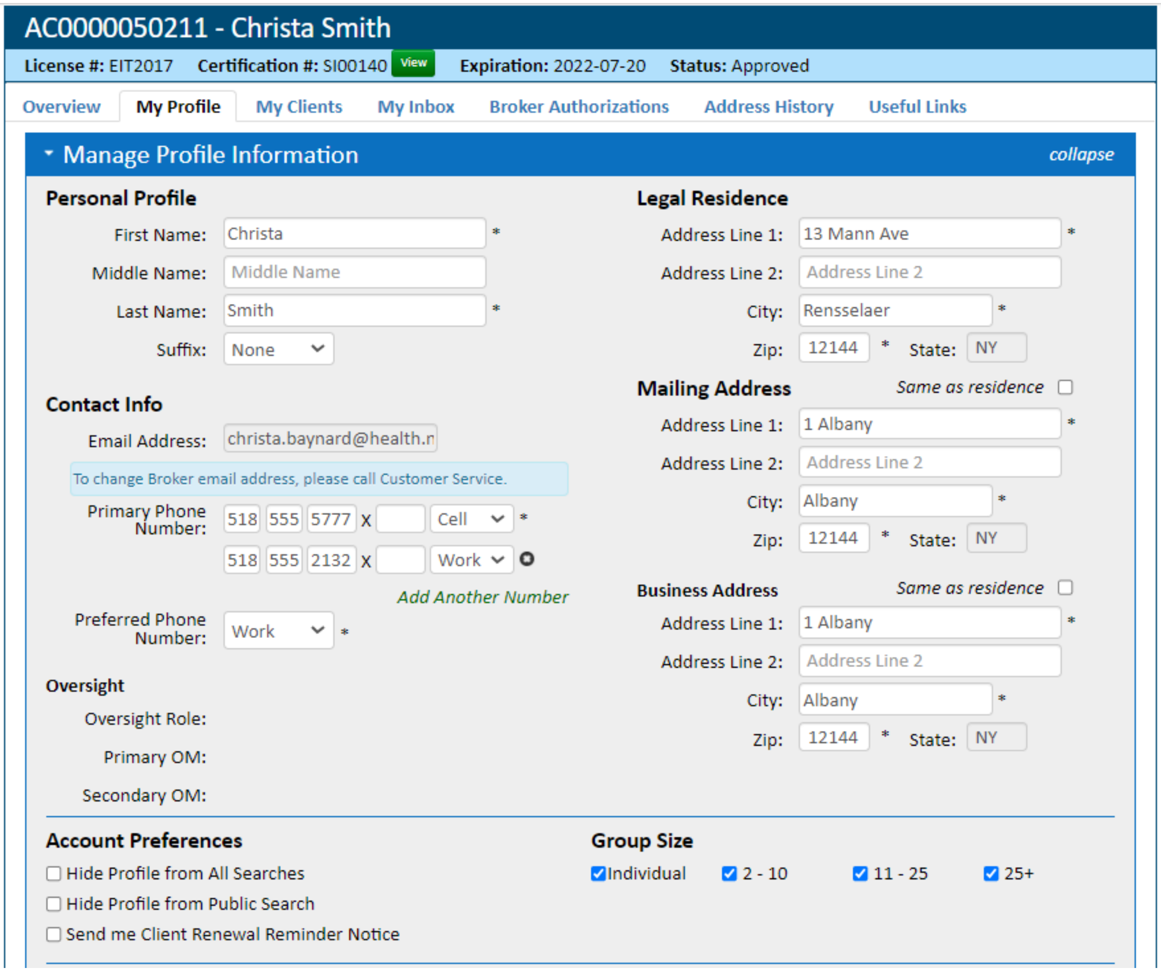
4. The *Overview* tab will appear after logging in every time. There are three (3) sections on the screen above which always display expanded but can be collapsed by clicking on the small triangle to the left of the section title.

   - *Messages and Notices* section will display the most recent notices that appear in the Broker's inbox. The full notice list can be found in the *My Inbox* tab.
   - *Employer Overview* displays the Employers that have been updated in the last six (6) months. The Employer's *Account Number, Business Name, Eligibility Status* and *Date of Eligibility Status* will appear.
   - *Individual Marketplace Overview* section displays individuals who are up for *Manual Renewal*, those awaiting *Verification*, and individuals whose *Eligibility* is *In-Progress*. It also displays individuals who are in progress under *Plan Selection Needed*, as well as *Communication Events*.

   Please note Brokers whose Certification begin with SX will only have two (2) sections on their Overview – "Messages & Notices" and "Employer Overview".

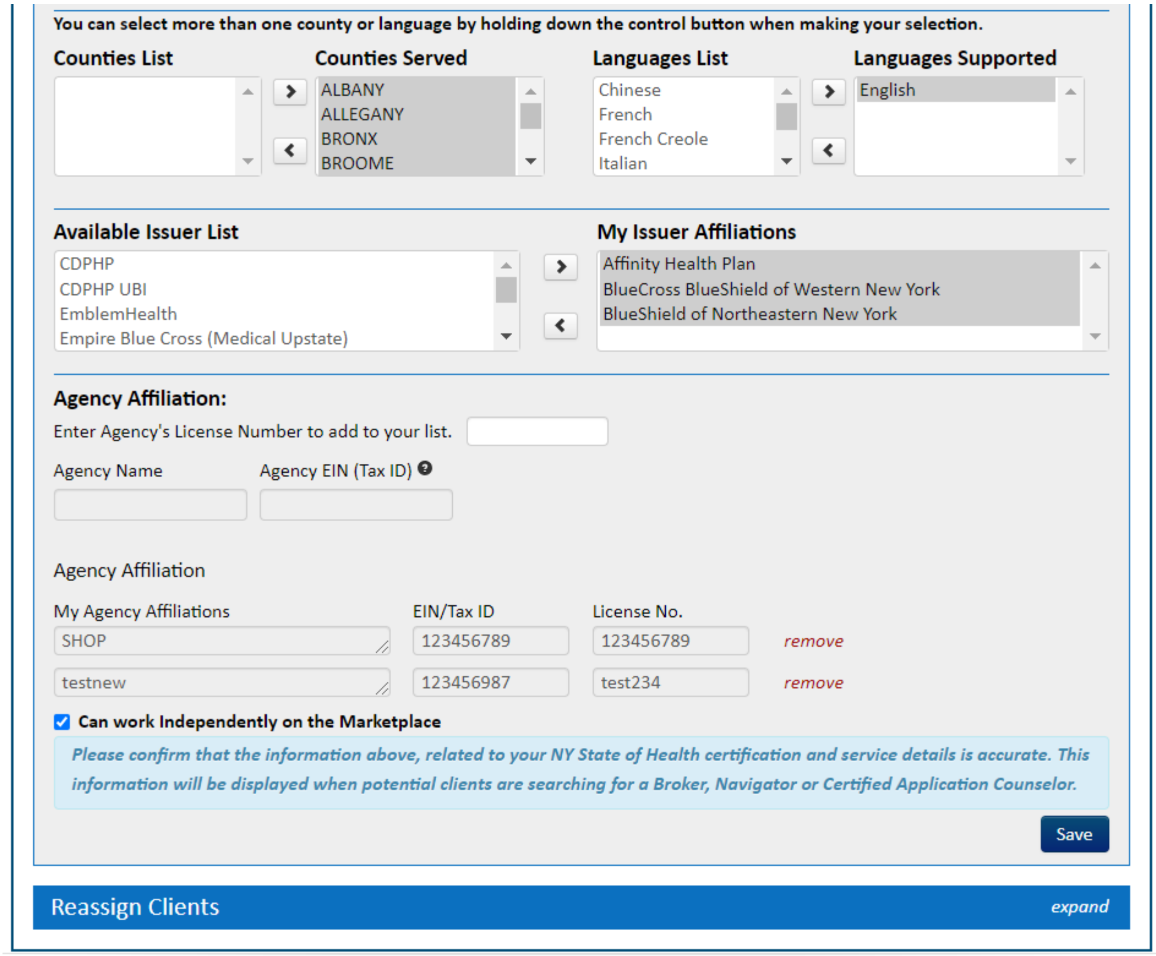


5. The *My Profile* tab allows Brokers to manage their personal and professional information. The *Email Address* field cannot be changed here, users must contact the NYSOH Customer Service Center for email address changes. Brokers may also contact the Broker Support Mailbox at: NYSOHBrokersupport@health.ny.gov.



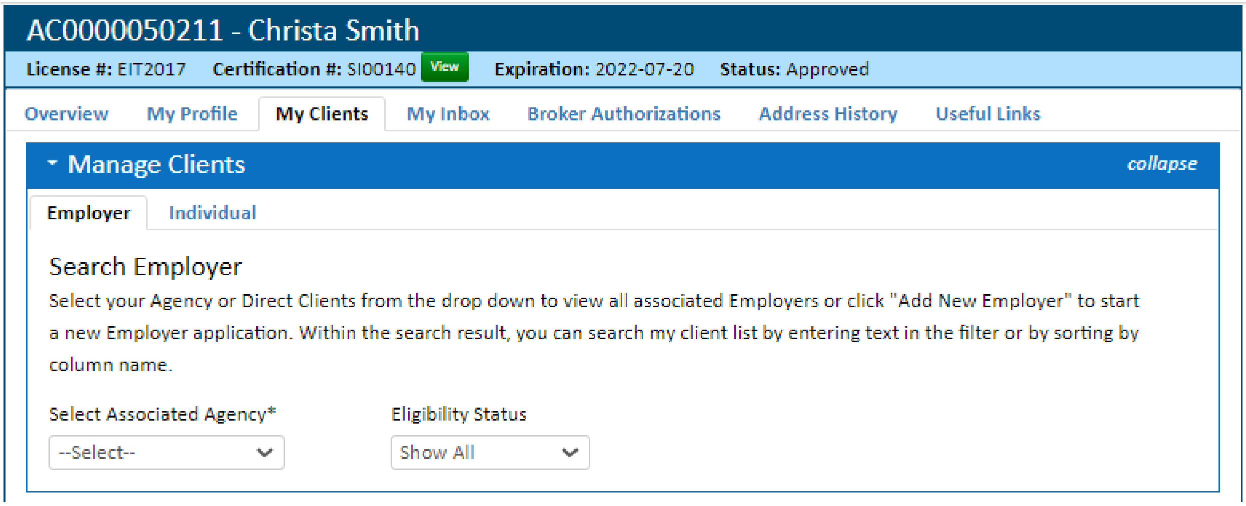
The *Account Preferences* section of the My Profile tab is used to set the parameters in which Brokers will appear in the public search.

- *Hide Profile from All Searches* – this functionality will hide the Broker from appearing in general searches. The Broker will not come up in direct searches, even by name. Customer Service will also not have the ability to locate a Broker with this selection using the Broker Search Tool.
- *Hide Profile from Public Search* – Hides a Broker from general public search results. However, if a user searches for the Broker by name, then the Broker will appear in the results list. This also still allows for a Broker to be assigned as a BOR for an individual or Employer

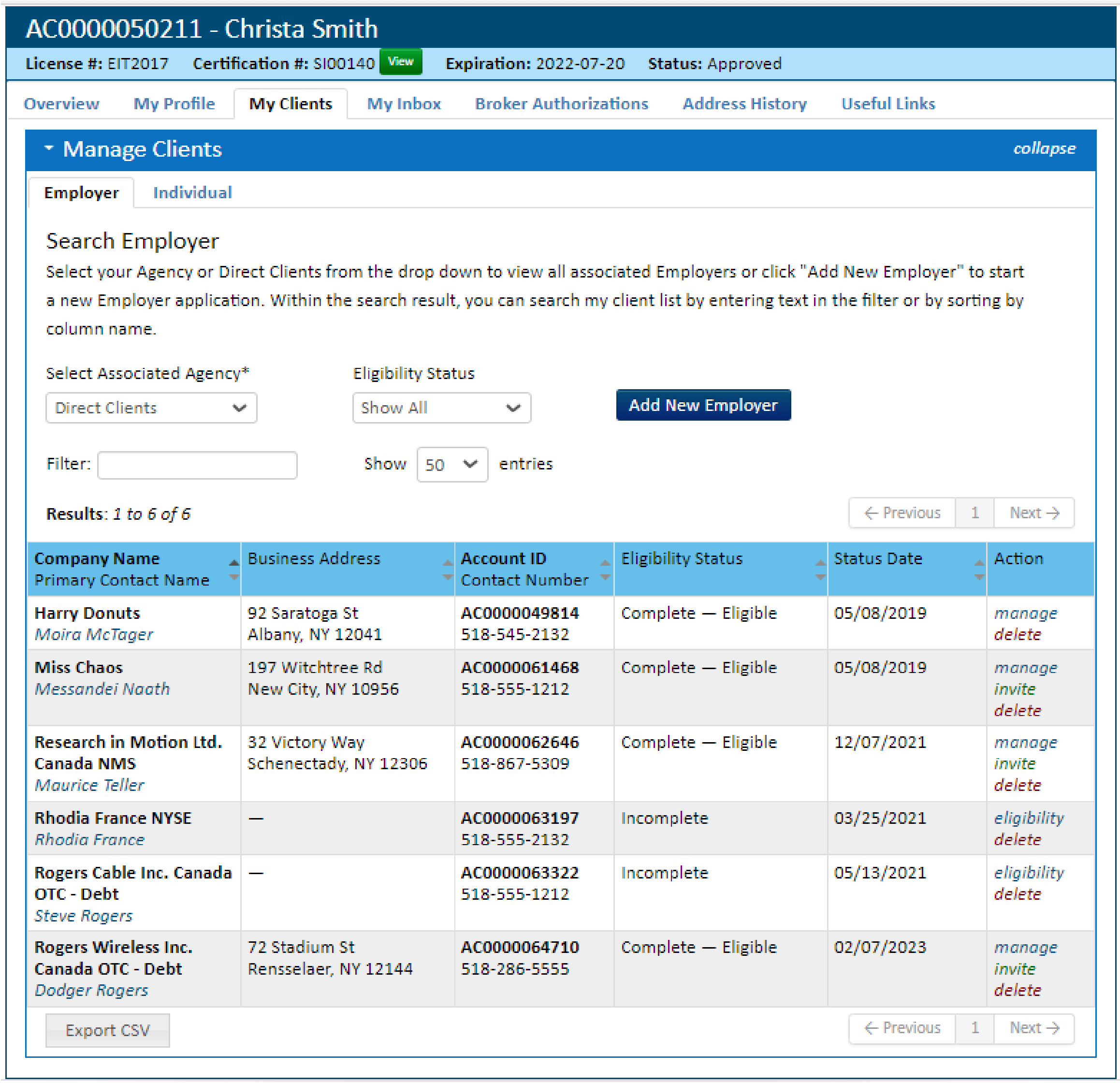


- *Agency Affiliation* allows Broker's to add multiple Agencies and select which Agency the Business or Individual will be allocated under.
- *Reassign Clients* is a collapsed section at the bottom. Click the header to expand the section and reassign clients from one Agency to another, or to/from no agency, also called Direct Clients. See the User Guide "How to Reassign Clients" to learn more.

6. 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 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 agency affiliation selected. The *Eligibility Status* dropdown allows for further filtering of the results list based on Employer *Eligibility Status.*



AC0000050211 - Christa Smith

License #: EIT2017 **Certification #:** SI00140 View **Expiration:** 2022-07-20 **Status:** Approved

Overview | My Profile | My Clients | My Inbox | Broker Authorizations | Address History | Useful Links

Manage Clients collapse

Employer | 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* Direct Clients

Eligibility Status Show All

Add New Employer

Filter:

Show 50 entries

Results: *1 to 6 of 6*

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Company Name Primary Contact Name	Business Address	**Account ID** Contact Number	Eligibility Status	Status Date	Action
Harry Donuts *Moira McTager*	92 Saratoga St Albany, NY 12041	**AC0000049814** 518-545-2132	Complete — Eligible	05/08/2019	*manage* *delete*
Miss Chaos *Messandei Naath*	197 Witchtree Rd New City, NY 10956	**AC0000061468** 518-555-1212	Complete — Eligible	05/08/2019	*manage* *invite* *delete*
Research in Motion Ltd. Canada NMS *Maurice Teller*	32 Victory Way Schenectady, NY 12306	**AC0000062646** 518-867-5309	Complete — Eligible	12/07/2021	*manage* *invite* *delete*
Rhodia France NYSE *Rhodia France*	—	**AC0000063197** 518-555-2132	Incomplete	03/25/2021	*eligibility* *delete*
Rogers Cable Inc. Canada OTC - Debt *Steve Rogers*	—	**AC0000063322** 518-555-1212	Incomplete	05/13/2021	*eligibility* *delete*
Rogers Wireless Inc. Canada OTC - Debt *Dodger Rogers*	72 Stadium St Rensselaer, NY 12144	**AC0000064710** 518-286-5555	Complete — Eligible	02/07/2023	*manage* *invite* *delete*

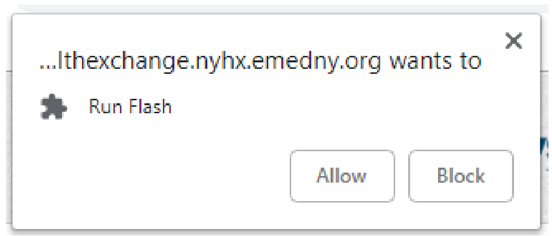
Export CSV

← Previous 1 Next →

- To add a new Employer, click the blue Add New Employer button.
- 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.
    - *Company Name/Primary Contact* – Business name displays on top of the Business Contact person.
    - *Business Address* – Physical Address of the business.
    - *Account ID/Contact Number* – Account Number (also known as the "AC#") displays over the business contact phone number.
    - *Eligibility Status* – This status pertains to the Eligibility Determination form completed for the business. A completed application is either "eligible" or "ineligible". If the application was left prior to being submitted, the status will display as "Incomplete".
    - *Status Date* – The date the Eligibility Determination form was completed or started (if in incomplete status).

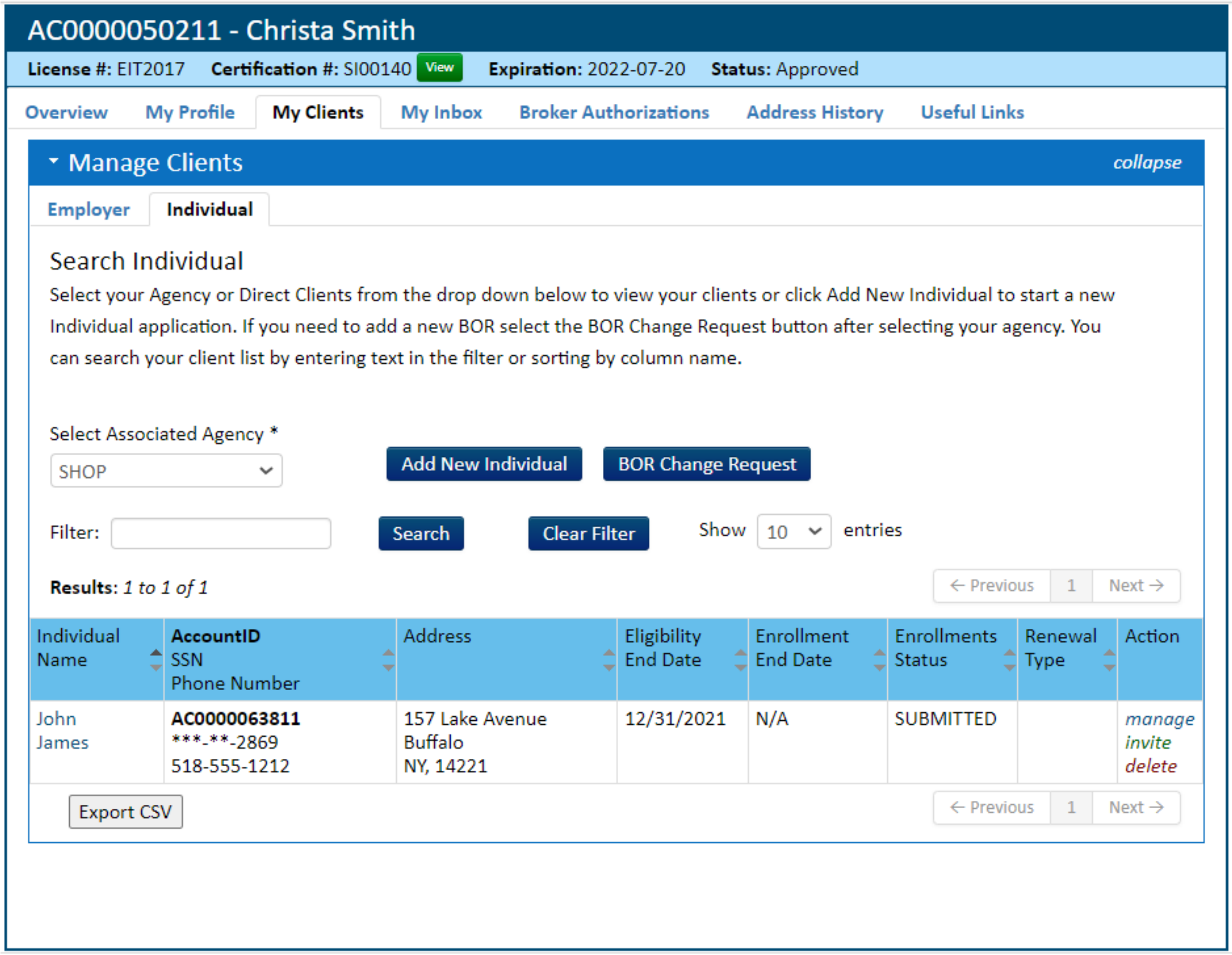
- *Action* – *Manage* brings the Broker to the Employer's account. *Delete* - will delete the Employer from the Broker's dashboard. *Invite* – click this after creating an account for an Employer group. This will invite the employer to create their own credentials to access their account.

- To print the complete list of the currently displayed clients, click the **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 CSV button will appear.

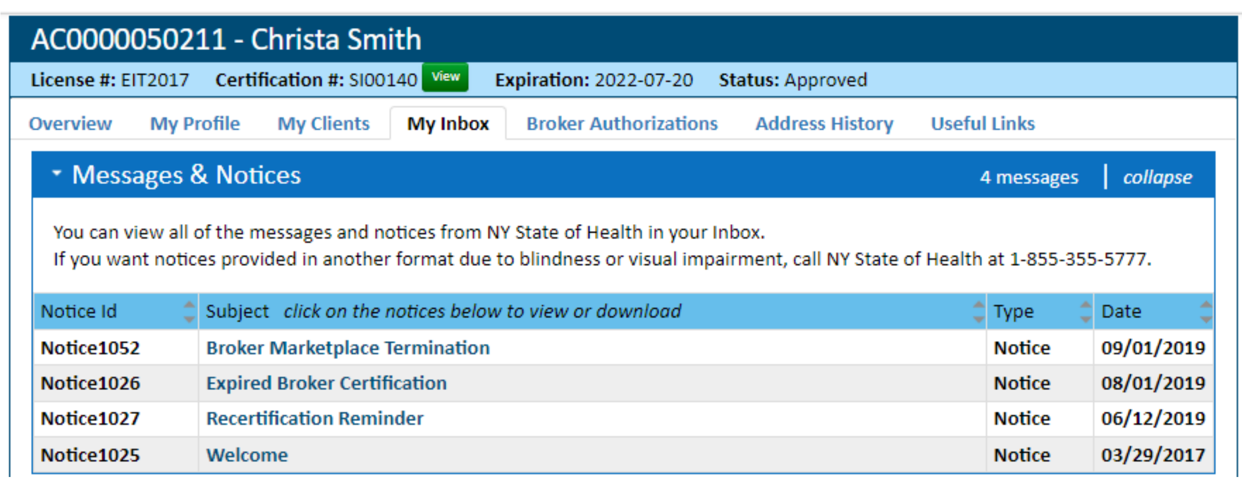


The *Individual* tab has similar information as the Employer tab. The Broker will select the *Associated Agency* which will produce a list of Individual Marketplace clients:

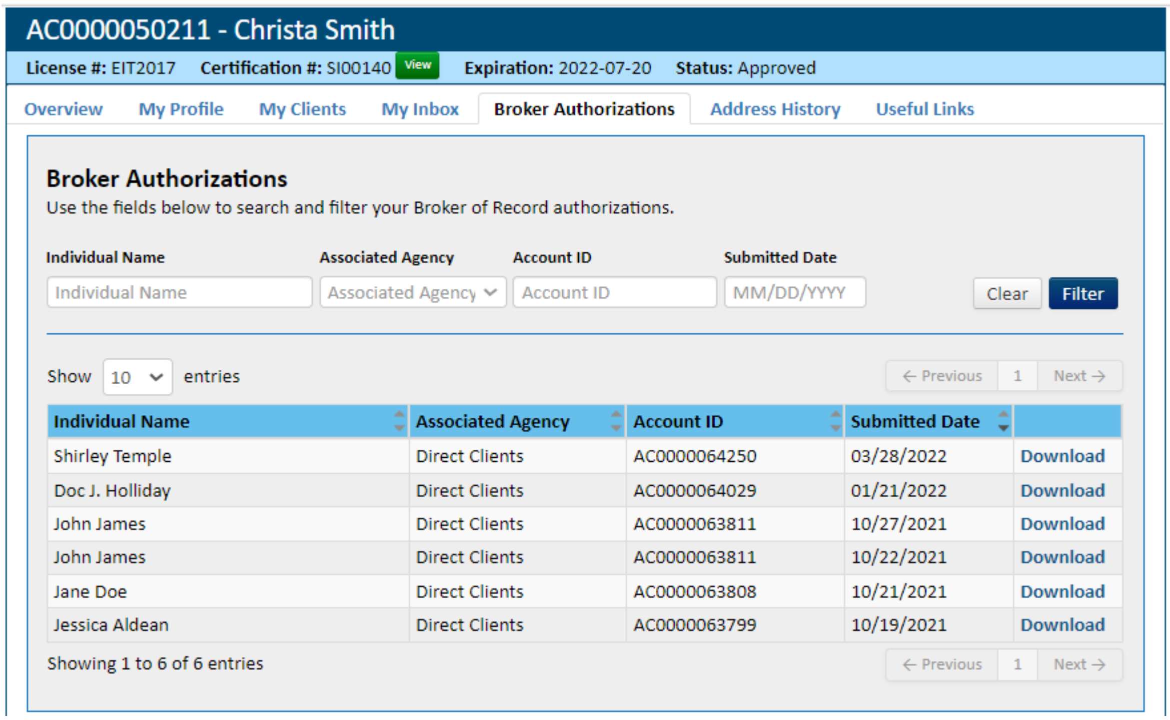
- *Name, Account ID/Social Security Number/Phone Number,* and *Address*
- *Eligibility End Date* – the date coverage will begin for the specified individual.
- *Enrollment End Date* – the date that the specified individual is covered through.
- *Enrollment Status* – Shows the progress of the enrollment with displaying *Not Started, In Progress,* or *Enrolled.*
- Renewal Type – Displays if the enrollments is automatic (*Auto*) or *Manual.*
- Action - *Manage* brings the Broker to the Individual's account. *Delete* - will delete the Individual from the Broker's dashboard. *Invite* – click this after creating an account for an Individual. This will invite the Individual to create their own credentials to access their account.



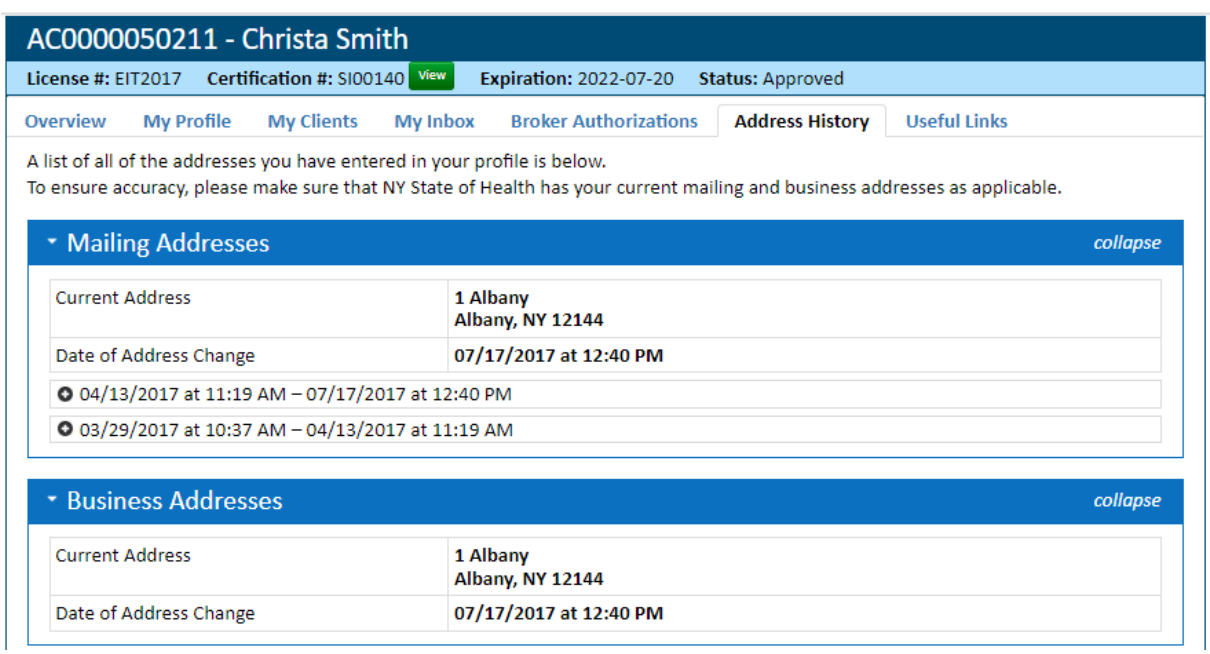
7. *My Inbox* will display all Notices that pertain only to the Broker. Notices pertaining to Individuals and Businesses can be found in their respective portals. To read a message, simply click the Subject (notice name). Notices can also be sorted by clicking on the arrows within the headers of each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



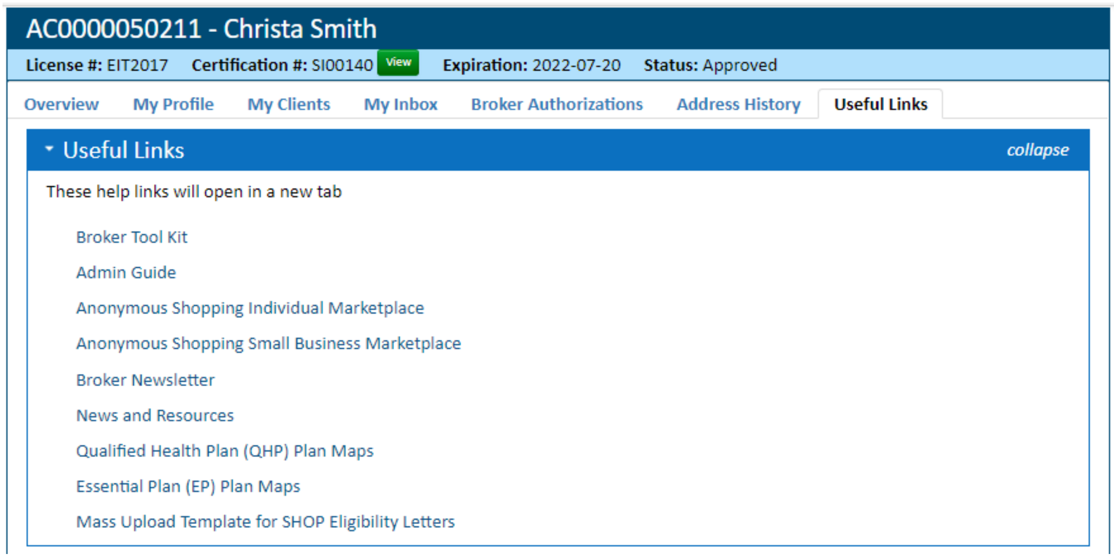
8. The *Broker Authorizations* tab displays Broker of Record (BOR) documents that have been auto generated in the NYSOH for a Broker's Employer and Individual clients. Click **Download** to open the document and print/download as needed.



9. 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.



10. 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.



- *Broker Tool Kit* will open a new window to access the Tool Kit, which contains many helpful desk-aides, trainings and policy documents that are useful to Brokers. This can also be accessed through the Broker sign-on screen.
- Admin Guide will display the high-level SHOP Policy document, known as the Admin Guide, posted in the Tool Kit.
- *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, to find plans and pricing for the current plan year.
- *Anonymous Shopping Small Business Marketplace* - This tool is only used for SBM clientele to view Certified SHOP plans.
- *Broker Newsletter* will display all Broker Newsletter communications sent to Brokers.
- *News and Resources* will open a new window to the NYSOH Resources page.
- *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.

***Continue to the next user guide: "Adding an Agency" to learn how to add an Agency to your Dashboard.**