

ASSISTOR AGENCY SUPERVISOR TRAINING

September 2021

Today's Presentation



Presenters

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Assistor Support Unit: Admin Group

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Assistor Support Unit: Eligibility and Enrollment/Case Support

Agenda

The Assistor Agency Supervisor Training will include:

1. Assistor Certification Training, Registration, and Recertification
2. Dashboard Management and the AOM Role
3. Contact Information and Staff Changes
4. Monitoring and Reports
5. Outreach, Customer Service, and Additional Resources

Agenda



Assistor Certification Training, Registration, and Recertification

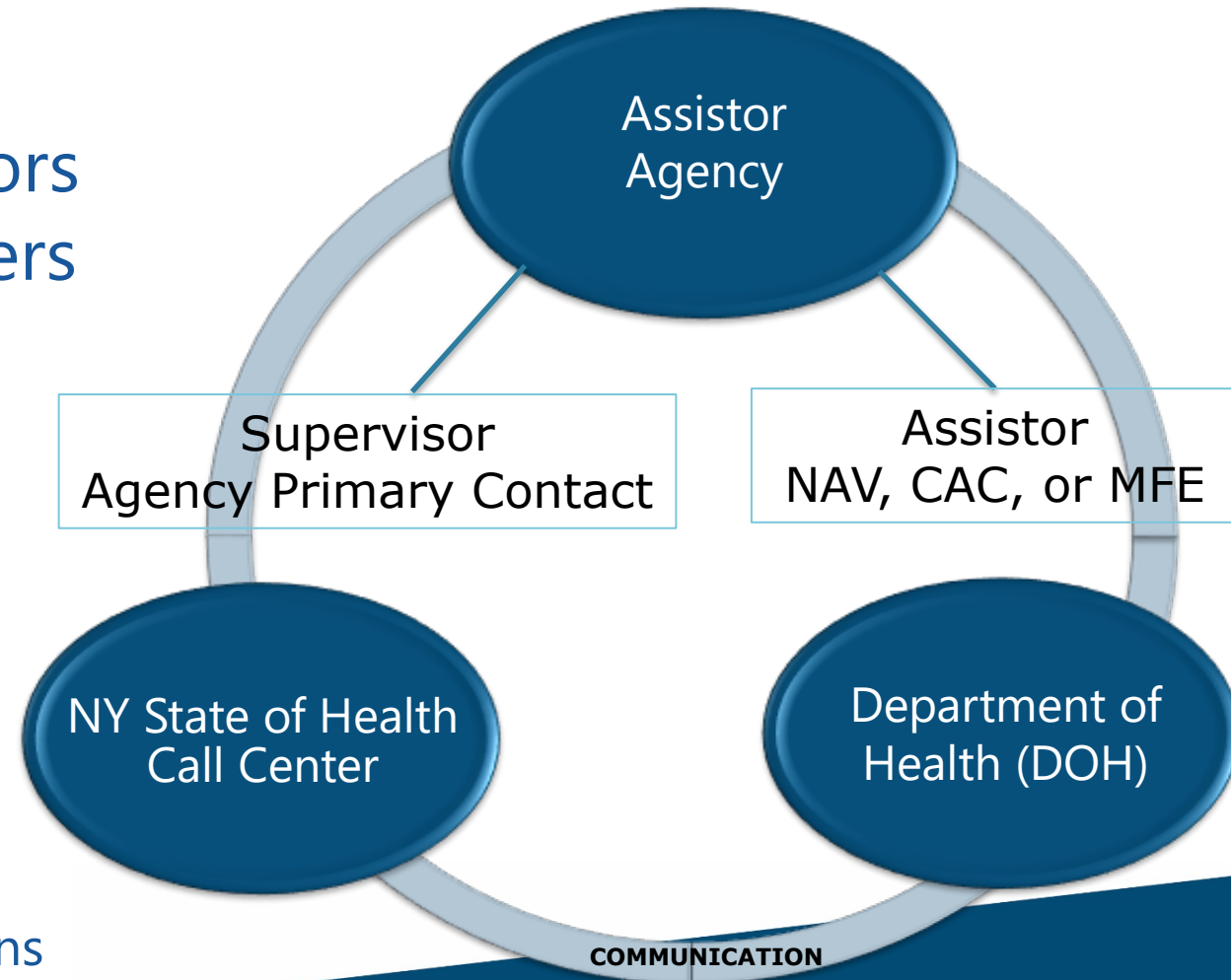
Assistor Certification Training, Registration, and Recertification

Types of Assistors:

- Certified Application Counselors
- Marketplace Facilitated Enrollers
- Navigators

Types of Agencies:

- Hospitals
- FQHCs
- Healthcare Providers
- LDSS
- Government Agencies
- Health Plans
- Community Based Organizations



Assistor Certification Training, Registration, and Recertification



Assistors will complete the **Online Assistor Certification Training** by going to: <https://www.nytrainingservices.com/healthassistors>

- Download and complete the Access Request Form for Assistors.
- Follow the instructions on that form to submit the registration to our training vendor.

If you need additional assistance registering, please email the Registration Mailbox at RegistrationTSP@maximus.com. This mailbox should be used for all initial registration issues, submission of the Access Request Form and any correspondence relating to the initial Certification Training.

Assistor Certification Training, Registration, and Recertification



Assistor completes **Assistor Certification Training**

5-7 Business Days

NY State of Health sends the assistor their **invitation code**.

NYS Department of Health sends the assistor the **instructions for registering** their account and their **agency's contract ID**.

Less than 60 days

The assistor creates their **NY.gov username** and sets up their **assistor account**. The assistor receives their **account number** and **certification number**.

Assistor Certification Training, Registration, and Recertification



Resources for **Assistor Account Creation**

Step by Step User Guides:

- Creating Your NY.gov:

<https://info.nystateofhealth.ny.gov/sites/default/files/NYSOH%20Assistors%20%20Creating%20Your%20NY.gov.pdf>

- Registering your assistor account:

<https://info.nystateofhealth.ny.gov/sites/default/files/NYSOH%20Assistors%20%20Registering%20Your%20Account.pdf>

If your assistors need assistance creating their assistor account, please email the Assistor Admin Mailbox at Assistor.Admin@health.ny.gov.

Assistor Certification Training, Registration, and Recertification



Assistor Account Creation and Identity Proofing

- All assistors must go through the identity proofing process in order to create an account.
- If an Assistor is unable to complete electronic Identity Proofing, an assistor must provide documentation.
- The ID Proofing fax number for assistors is **(518) 486-6282**.
- Submission must include:
 - A fax cover sheet
 - Appropriate documents to prove identity
- DOH will process their documents and send an email confirming that they can move forward with the registration process.

ASSISTOR Identity Proofing Fax Cover Sheet

TO: OFFICE OF HEALTH INSURANCE PROGRAMS (OHIP)	FROM (NAME OF ASSISTOR): _____
OHIP FAX NUMBER: (518) 486-6282	ASSISTOR FAX NUMBER: _____
ASSISTOR PHONE #:	TOTAL # OF PAGES: _____
AGENCY NAME: _____	DATE OF FAX: _____
NOTES: _____	RE: ASSISTOR IDENTITY PROOFING

Two from List A **OR** **One from List A**
AND
Two from List B

List A	List B
• U.S. Passport book or card	• Birth certificate
• Driver's license	• Social Security card
• Official Government Identification card	• Marriage certificate
• School Identification card	• Divorce decree
• U.S. military card or draft record	• Employer Identification card
• Military dependent's Identification card	• High school diploma
• Native American Tribal Document	• College diploma
• U.S. Coast Guard Merchant Mariner card	• High school equivalency diploma
• Certificate of Naturalization (N-550 or N-570)	• Property deed or title
• Certificate of U.S. Citizenship (N-560 or N-581)	

Assistor Certification Training, Registration, and Recertification



RECERTIFICATION PROCESS

- DOH will host a series of Recertification Webinars (usually May – October) each year.
- Assistors are required to view ALL webinars to recertify.
- Keep track of the date you watch the live webinar or the video.
- The webinar supplements the initial Certification training. New assistors must watch too!
- Recertification webinars are posted here: <https://info.nystateofhealth.ny.gov/SpringTraining>

- When the Recertification series is complete, DOH will send each agency a Recertification Report with a list of their registered assistors. The supervisor will complete the spreadsheet by entering the dates each assistor viewed the webinars.
- The supervisor must attest that the information on the Recertification Report is accurate.
- If there is no response, DOH will remove the agency's assistor's access to NY State of Health.

Assistor Certification Training, Registration, and Recertification



In Summary...

A supervisor of assistors can:

- Help staff register for training
- Help staff understand concepts introduced in the training
- Help staff register their assistor accounts
 - Use more experienced assistors as mentors
- Ensure that their assistors are recertified every year

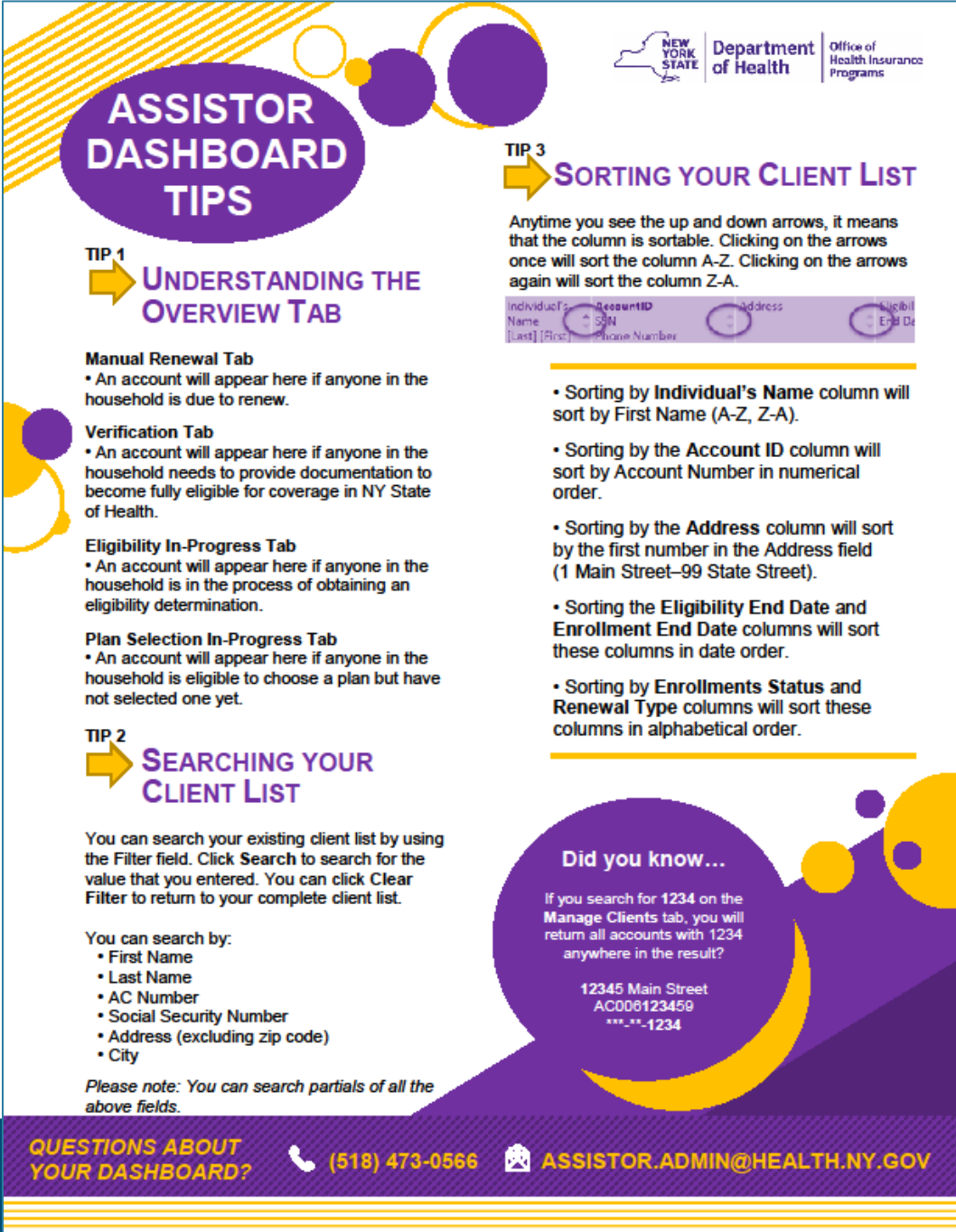
Agenda

Dashboard Management and the AOM Role

Dashboard Management and AOM Role

Assistor Dashboard

- Sit with the Assistor and discuss each tab and section of the Dashboard
 - Review the Assistor's Profile for Accuracy
 - Supervisors should give the Dashboard Tip Sheet to each Assistor
- <https://info.nystateofhealth.ny.gov/assistor toolkit>



NEW YORK STATE | Department of Health | Office of Health Insurance Programs

ASSISTOR DASHBOARD TIPS

TIP 1 → **UNDERSTANDING THE OVERVIEW TAB**

Manual Renewal Tab
• An account will appear here if anyone in the household is due to renew.

Verification Tab
• An account will appear here if anyone in the household needs to provide documentation to become fully eligible for coverage in NY State of Health.

Eligibility In-Progress Tab
• An account will appear here if anyone in the household is in the process of obtaining an eligibility determination.

Plan Selection In-Progress Tab
• An account will appear here if anyone in the household is eligible to choose a plan but have not selected one yet.

TIP 2 → **SEARCHING YOUR CLIENT LIST**

You can search your existing client list by using the Filter field. Click Search to search for the value that you entered. You can click Clear Filter to return to your complete client list.

You can search by:

- First Name
- Last Name
- AC Number
- Social Security Number
- Address (excluding zip code)
- City

Please note: You can search partials of all the above fields.

TIP 3 → **SORTING YOUR CLIENT LIST**

Anytime you see the up and down arrows, it means that the column is sortable. Clicking on the arrows once will sort the column A-Z. Clicking on the arrows again will sort the column Z-A.

Individual's Name (Last) [First]	Account ID (AC)	Address	Eligibility End Date
1234	5678	9012	3456

- Sorting by **Individual's Name** column will sort by First Name (A-Z, Z-A).
- Sorting by the **Account ID** column will sort by Account Number in numerical order.
- Sorting by the **Address** column will sort by the first number in the Address field (1 Main Street–99 State Street).
- Sorting the **Eligibility End Date** and **Enrollment End Date** columns will sort these columns in date order.
- Sorting by **Enrollments Status** and **Renewal Type** columns will sort these columns in alphabetical order.

Did you know...

If you search for 1234 on the Manage Clients tab, you will return all accounts with 1234 anywhere in the result?

12345 Main Street
AC006123459
***-**-1234

QUESTIONS ABOUT YOUR DASHBOARD? (518) 473-0566 ASSISTOR.ADMIN@HEALTH.NY.GOV

Dashboard Management and AOM



Assistor Oversight Manager (AOM) will help your agency better manage the work of your assistors. The AOM will have a read-only view of their assistor's dashboard. The AOM must be a registered Assistor and will complete the annual recertification process.

AOM Role Assignment

- Supervisors should know who will have the AOM Role at your agency.
- There are two types of managers:
 - Primary AOM will have access to the dashboards of ALL assistors at the agency
 - Secondary AOM will only have access the assistors they supervise. Depending upon the structure of your assistor program, you may want to have multiple secondary AOMs.

Dashboard Management and AOM



Assistor Oversight Manager (AOM) will use the Health Commerce System

- Files/Reports are distributed to the AOM using the Health Commerce System (HCS)
- If your agency has an HCS account, the HCS Coordinator can use a paperless process to add new HCS users. If you do not know your HCS Coordinator, please call the Commerce Accounts Management Unit (CAMU) at 1-866-529-1890 option 1 (M-F 8am-4:45pm). Supervisors can also request the "HCS New Agency" form.
- The AOM Assignment Form must be complete and include both the supervisor's assistor AC# and their HCS username. The AOM Role will not be linked to your dashboard unless this information is complete.
- If you need help completing these forms, send an email to: Assistor.Admin@health.ny.gov. Please include your phone number so that we can speak to you directly.

Dashboard Management and AOM Role



Training for the AOM Role

- All Supervisors who have the AOM Role must be trained.
- Supervisors will be sent a link to the AOM training and must attest that they watched the training video.
- Remember: The AOM will be able to search for “My Assistors” and “My Assistors’ Clients”
- Client Search Criteria: AC#, Name, Address, DOB

Dashboard Management and AOM



Reports for the AOM

Supervisors will be able to create the following reports for a single assistor or a group of assistors.

The reports are Excel files and can be sorted and filtered.

Reports are stored securely on the HCS.

AOM REPORT NAME	KEY REPORT TOPICS
Client Eligibility by Program Type	Program Type by Client Eligibility Start and End Dates Select 1-2 Assistors Member Details
Documentation Clocks	Encourage Follow-Up with Clients Income and Immigration Documents Program Type for each Member
List of Account Holders	Accounts on Dashboard Address of Consumer Last Activity Date Assigned AOM
Number Eligible and Enrolled	Eligibility by Program Enrolled by Program Type Eligibility Start and End Dates
Profile Details	Profile Accuracy # of Assistors Staff Changes Address, Counties Served, Languages
Renewal Status	Renewal Cycle # of Accounts Due to Renew
Total Count by Application Status	Compare Assistor Productivity # of Active and Inactive Accounts # Due to Renew or Document
Weekly Activity	Compare Activity by Week # Added or Removed from Dashboard # of Life Status Changes

Dashboard Management and AOM



Check for Understanding

Angela is the Primary AOM for ABC Healthcare. She supervises 10 assistors. Angela wants to investigate if she has any assistors with clients living near the hospital's new clinic. She also wants to determine how many of her assistors speak Polish. How can Angela use her AOM functionality to investigate?

- A. Angela will export a Renewal Report.
- B. Angela will review the Document Verification tab.
- C. Angela will update her Assistor Profile.
- D. Angela will run two AOM reports: The first report is the "Profile Details Report" so that she can review the languages listed within her assistor's profiles. The second is the "Account Holder Details Report." Angela will search and filter to find the zip code located near the clinic.

Agenda



Contact Information and Staff Changes

Contact Information and Staff Changes



How can DOH support my Assistors and Program Managers?

- Updating Contact Information Forms
- Report Staff Changes

Contact Information and Staff Changes



- Assistor agencies should update their contact information throughout the year as changes occur
- Annual **Contact Information** Review
 - Primary Contacts, addresses, service area, and list of assistors should be reviewed and sent back to Assistor.Admin@health.ny.gov.

Contact Information and Staff Changes



Reporting Staff Changes

- **Any changes in assistor staffing at your agency must be reported within 48 business hours of the change to Assistor.Admin@health.ny.gov.**
 - Must include:
 - Sufficient information to identify the assistor
 - Effective Date
 - Name of another assistor to transfer accounts to or indicate unassign

DO NOT wait until Recertification to report that someone is no longer functioning as an assistor!

Contact Information and Staff Changes



From: Assistor Agency Supervisor
Sent: Tuesday, February 16, 2021
To: Assistor.Admin@health.ny.gov
Subject: Assistor No Longer Employed

Good Morning,

Sally Smith resigned on 2/15/21.
Her certification number is 123-4444444 and her account number is AC0001234567.

Please close her account and re-assign her accounts to Jim Jones.
His certification number is 123-9999999 and his account number is AC0005678901.

Thank you.

Did this supervisor report this staff change appropriately?

Agenda



Monitoring and Reports

Monitoring and Reports

How can a supervisor be prepared to monitor their Assistors

- Dashboard Management and AOM Role
- Facilitate Staff Meetings
- Develop a Referral Network with Other Agencies
- Account Review – Look for Trends by Category

Monitoring and Reports

What happens when a Supervisor needs more help?

- Account Review Template – Encrypted Spreadsheet
<https://info.nystateofhealth.ny.gov/news/assistor-training-account-review-template>
- Submitting Cases to DOH
- Receiving Responses to Cases

Monitoring and Reports



DOH Reports Sent to Agency Supervisors

Productivity and Enrollment Reports

Provides eligibility and enrollment activity associated with your agency's assistors

Lists of Accounts that need Outreach/Review

These spreadsheets are designed to give you information about clients on your assistor's dashboard. The spreadsheet should be separated by assistors and may need your response.

Assistor Newsletter and NY State of Health Website

Provides monthly activity and a schedule of upcoming events that will interest your agency's assistors.

Monitoring and Reports

Check for Understanding

A client has contacted DOH and stated that an assistor never uploaded his paystubs. The client files a complaint against the assistor. DOH does research about the issue and learns that the assistor helped the consumer change the household income last week. DOH emails the supervisor an encrypted Account Review Template and wants the supervisor to investigate. Should the supervisor meet with the assistor and respond to this DOH request?

YES or NO

Agenda



Outreach, Customer Service and Additional Resources

Outreach, Customer Service, and Additional Resources



Outreach Events

- Review your Agency's Contact Information Form:
 - Checkbox for public events
 - Counties for public events
- NY State of Health Events Map and Events Submission
 - Online form for assistors to submit events for the Events Map
<https://www.surveymonkey.com/r/NYSOHCalendarEvents>
 - Events Map: <https://info.nystateofhealth.ny.gov/events>
- Social Media Training Webinar: <https://info.nystateofhealth.ny.gov/news/assistor-training-social-media>
- Outreach Tool Kit: <https://info.nystateofhealth.ny.gov/outreachtoolkit>

Outreach, Customer Service, and Additional Resources



Customer Service Tips

How can my assistor have a successful appointment?

- Give consumers a brief overview of the application process
- Tell the consumer what they need to bring to the appointment
- Obtain information about people applying and living in their household
 - Demographic details: names, date of birth, social security numbers, income for all household members, immigration document numbers, information regarding any other health insurance that they have or will have access to

Outreach, Customer Service, and Additional Resources



Customer Service Tips

It is a good idea to have the consumer authorize you as their assistor prior to their appointment

If the consumer has an account, they can authorize their assistor:

- On their own, by logging into their individual account with their NY.gov username and password
- With the help of the call center

If the consumer is unable to authorize the assistor before the appointment, the assistor will need to call the marketplace with the consumer to authorize the assistor.

If the consumer does not have an account, an assistor can help them create a new account.

Outreach, Customer Service, and Additional Resources



Customer Service Tips Speaking to the Call Center

- The level of assistance a Customer Service Specialist (CSS) at the call center may provide to an Assistor depends on:
 - Whether the assistor is authorized to speak on behalf of the consumer
 - Whether the consumer is present (either in person or on the phone) with the Assistor at the time of the call
- Authenticating
- Authorizing

Outreach, Customer Service, and Additional Resources



Customer Service Tips

Post Enrollment Assistance

- Make sure consumers enroll... and stay enrolled
 - Contact Information
- Documents to Confirm Eligibility
 - Income Documents
 - Immigration Status
- Follow Up Appointments

Outreach, Customer Service, and Additional Resources



Assistor Resources Identity Proofing for Consumers

- Identity Proofing (English and Spanish Resources)
 - Identify Proofing Fax Coversheet for Assistors
 - Identity Verification Form (DOH-5088)
 - Attestation of Identity Form (DOH-5090)
 - Identity Verification Form (Children 17 or Younger) (DOH-5091)

Outreach, Customer Service, and Additional Resources



Assistor Resources

- Websites

- Assistor Tool Kit

- <https://info.nystateofhealth.ny.gov/assistor toolkit>

- Spring Training Webinars

- <https://info.nystateofhealth.ny.gov/SpringTraining>

- Additional Webinars

- <https://info.nystateofhealth.ny.gov/webinars>

Outreach, Customer Service, and Additional Resources



All Assistors

Assistor training questions: Eligibility.Training.Support@health.ny.gov

If you have a case specific question, the issue should be sent on an encrypted Account Review Spreadsheet to:
Assistor.Cases@health.ny.gov

If you need help with your NY State of Health assistor account or Need to report a staff changes, email:
Assistor.Admin@health.ny.gov

Navigators Only

•When Navigator Agencies are submitting contract documents (vouchers, annual packet documents, progress reports, site schedules, etc.) and related questions, please send them to:

Navigator.Admin@health.ny.gov and CC your Navigator Contract Manager

•When Navigator Agencies are submitting media approval requests, educational and marketing material approval requests, and consumer story submissions, please send them to:

Navigator.Media@health.ny.gov and CC your Navigator Contract Manager

Outreach, Customer Service, and Additional Resources

NY State of Health - Call Center Information



Call Center – General Questions

<u>General Customer Service</u>	<u>1-855-355-5777</u>
<u>General Fax</u>	<u>1-855-900-5777</u>

Consumer Identity Proofing

<u>ID Proofing Fax</u>	<u>1-518-560-5102</u>
<u>ID Proofing Telephone Follow Up</u>	<u>1-855-357-8450</u>

1095-A & 1095-B Dedicated Line

<u>Customer Service Line</u>	<u>1-855-766-7860</u>
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Summary

- All assistors must successfully complete initial certification training and annual recertification. Supervisors will ensure that assistors know they have 60 days to register their NY State of Health assistor account.
- The Assistor Agency will respond timely to recertification and other outreach requests from DOH. Supervisors must confirm the annual recertification information about each assistor.
- Supervisors will meet with Assistors to discuss their dashboard and determine who should have the AOM Role.
- Assistor Agencies must inform DOH of changes in an assistor's employment status, either temporary or permanent, within 48 business hours of such change.
- Supervisors must maintain accurate contact information with the DOH.
- Supervisors should meet with Assistors to discuss ways to improve customer service. Monitor and use the DOH reports to have better oversight of the application and enrollment process.
- Remember: Communication is the key to a successful Assistor program.

Thank you for participating in this training!



All Assistor Agencies must have a supervisor view this training. If you have questions about this training, please send them to Assistor.Admin@health.ny.gov.