

AUTHORIZED REPRESENTATIVES

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- Assistors must explain to consumers that NY State of Health takes every precaution to maintain the privacy and security of their information.
- Assistors cannot give information out to individuals who have not been designated as an Authorized Representative (AR) by the account holder and that AR must have been identity proofed.
- Identity verification protects the account holder, and everyone else who is listed on the account, from unauthorized access.

AUTHORIZED REPRESENTATIVES



The Assistor may not work with anyone besides the account holder, unless they are assigned as an authorized representative to the account.

- The Assistor must call the Call Center to ensure the AR assignment is in place before working with the AR.

If the individual is not the account holder and they are not the AR, the Assistor may advise:

- If 21 or over, the consumer can call NY State of Health and be authenticated by the Call Center and will be able to receive coverage and enrollment information for anyone on the account.
- If 18 – 20, the consumer can call NY State of Health and be authenticated and will be able to receive information about their own coverage and enrollment.
- Updates may not be made to the account without AR designation.

AUTHORIZED REPRESENTATIVES, CONTINUED



- Assistors may explain the process to designate an AR and inform the consumer that this includes a family member, friend, lawyer or other trusted person.
- Consumers may also add an AR to their account as part of their online application. This functionality can be accessed by having the consumer log into their account independently (not from the Assistor dashboard), or by calling the Call Center.
- There are two types of ARs that the consumer can add to their account:
 - **24 Hour ARs - Will not** be required to be identity proofed.
 - Have access to a consumer's account for 24 hours (from when access is granted) or until consumer chooses to end access (before 24 hours expires).
 - **Permanent ARs - Will be** required to be identity proofed.
 - Have indefinite access to a consumer's account (until the consumer chooses to end the access).

AUTHORIZED REPRESENTATIVES, CONTINUED



- Assistors can present the “Combined Authorized Representative Designation and Authorized Representative Identity Verification Form”.
- The Assistor may help the consumer complete the forms:
 - Schedule another appointment (if needed) to gather identity proofing documents for the AR and fax the forms to NY State of Health.
 - OR
 - Advise the consumer on how to fax or mail the documents to NY State of Health themselves (if they don’t have the appropriate documents available during their appointment).
 - In this scenario, the Assistor should take the time to review the forms and all the instructions on the forms with the consumer, to ensure that they understand the entire process and what documents will be acceptable.

AUTHORIZED REPRESENTATIVES, CONTINUED



- Authorized representative forms and accompanying documentation can be sent to:
 - Mail: NY State of Health, PO Box 11727, Albany, NY 12211.
 - Fax: 1-855-900-5557.
 - These forms cannot be uploaded at this time.

A consumer's Authorized Representative information is not visible to the Assistor.

- Assistors should contact the Call Center to confirm the forms have been successfully processed and that the AR has been assigned to the account, before working directly with an AR.
 - **NOTE**: It could take 7 to 10 business days for the form and documents to be processed by the Call Center.
 - ❑ If an AR is permanently assigned to an account, they will remain authorized on that account, even if the Assistor changes, until/unless the consumer un-authorizes them.

SCENARIO #1

You meet with Emily in person and assist in creating an account and obtaining health insurance for her, her spouse, Xiao and their daughter Sam. Xiao calls you two weeks later and wants to change Sam's CHPlus plan. He tells you that her pediatric asthma specialist provider doesn't participate in the current plan. The appropriate response is:



If he has not been designated as an AR, then the Assistor cannot make the changes to the account that he is requesting.

QUESTIONS?



Send us an email at Eligibility.Training.Support@health.ny.gov