

How to Add an Agency Affiliation

1. After you've successfully created your broker account (see, "How to Create a Broker Account"), click the *Account Settings* option on the dashboard.

The screenshot shows a user dashboard for Holly Gray, logged in as HollyG_BROKER. The dashboard includes navigation links for My Clients, Messages & Notices, and Documents. The left sidebar displays account holder information: Holly Gray, Account Settings (circled in red), Account No: AC000022612, Certification No: SI63141, and Expiration Date: 2016-05-22. The main content area features an Overview section with instructions on selecting a client's account to manage. Below this is the My Clients section, which includes tabs for Employer, Employee, and Individual. A dropdown menu for 'Select Associated Agency*' is currently set to '--Select--'. There is also a 'Search Employer' section with a 'Filter Options' button and input fields for 'Employer (Company Name)' and 'Primary Contact', along with a 'Reset All' button. A note at the bottom of the search section reads: '*Please click on 'eligibility' for the employer you want to enroll.' Below the note is a table with the following columns: Company, Client Name, AccountID, Phone Number, Eligibility Status, Enrollment Status, Employees, Renewal Date, and Action.

Logged in as HollyG_BROKER My Dashboard Sign Out

My Clients Messages & Notices Documents

Account Holder Info

Holly Gray

Account Settings

Account No: AC000022612

Certification No: SI63141

Expiration Date: 2016-05-22

Overview

Here you can select a current client's account to manage. Please select an agency from the drop down menu below. To continue managing your account select Show Employer List. If an employer has authorized you to manage their account but is not on your client list, you can add them by clicking Add Employer.

My Clients

Employer Employee Individual

Select Employers of an Associated Agency or Select All.

Select Associated Agency*

--Select--

Search Employer

Filter Options

Employer (Company Name) Primary Contact

Reset All

*Please click on 'eligibility' for the employer you want to enroll.

Company	Client Name	AccountID	Phone Number	Eligibility Status	Enrollment Status	Employees	Renewal Date	Action
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2. Scroll down on the **My Profile** page until you see Producer/Navigator Profile. Click *Edit*.

Logged in as HollyG My Dashboard Sign Out

[My Clients](#) [Messages & Notices](#) [Documents](#)

Congratulations! You are approved to conduct Business on Exchange. [Manage Clients](#)

My Profile

You can edit your profile information below.

Basic Information

* Mandatory Field

First Name *	Middle Name	Last Name *	Suffix
<input type="text" value="Holly"/>	<input type="text" value="Middle Name"/>	<input type="text" value="Gray"/>	<input type="text" value="--Se"/>

E-mail Address *	User Name
<input type="text" value="colleen.williams@health.ny.gov"/>	<input type="text" value="HollyG_BROKER"/>

Certification Status	Phone Number: *
<input type="text" value="APPROVED"/>	<input type="text" value="(518) 555-1234"/>

Agency Name	State License Number
<input type="text" value=""/>	<input type="text" value="22222"/>

State License Name

First Name	Middle Name
<input type="text" value="First Name"/>	<input type="text" value="Middle Name"/>

Last Name
<input type="text" value="Last Name"/>

Account Number	Agency WebSite URL
<input type="text" value="1123"/>	<input type="text" value=""/>

Contact Address*

Your contact preferences can be edited below.

Mailing Address

100 Main Street

City:
Albany

Zip
12203

Address Line 2:

Address Line 2:

County
ALBANY

State
NY

Residential Address

100 Main Street

City:
Albany

Zip
12203

Address Line 2:

Address Line 2:

County
ALBANY

State
NYate

Preferred Language *

Select options

Preferred Method of Contact *

Email

Producer/Navigator Profile

Edit

Additional Contact Information

Edit

View Certificate Nos

View

Re-Assign Clients

Edit

Save

3. On the **Producer** page, enter the **Agency License Number**. The **Agency Name** will populate. Add the agency EIN. Click *Add* and then *Submit*.

Producer

Please confirm that the information below, related to your NYS license affiliation and service details is accurate. This information will be displayed when potential clients are searching for a Broker or Navigator.

State License No. Certification No.

Certification Valid From Certification Valid To

Agency Management

* Please enter your agency license number to add agency.

Agency License Number Agency Name

Agency EIN (Tax ID)

* By clicking this, you can work independently on the Marketplace.

Counties Served
ALLEGANY
BRONX
BROOME

Languages Supported
Spanish
Chinese
Italian

Group Size Preferences
2 - 10
11 - 25
25+

Issuer Affiliations
Affinity Health Plan
BlueCross BlueShield of West
BlueShield of Northeastern Ne

* By clicking this, you will not show up on the public search screen.