

**NY State of Health
Assistors
Registering Your Account**

Assistors: Navigators, Certified Application Counselors (CACs), and Marketplace Facilitated Enrollers (MFEs)

Registering your Assistor account on NY State of Health

This is a step-by-step guide to help Assistors set up their account. Assistors must successfully complete certification training and then create their account with NY State of Health in order to gain access to their Assistor Dashboard.

Before you can set up your Assistor account, you MUST:

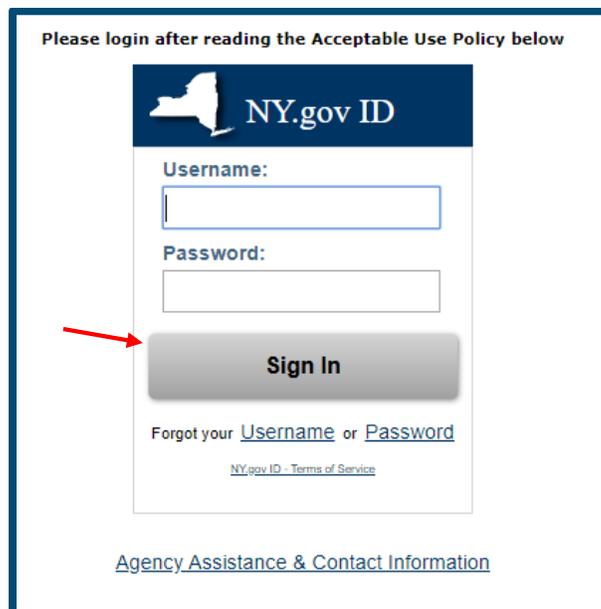
1. Have a NY.GOV username and password
 - *If you do not have a NY.gov account, go to the [Assistor Toolkit](#) page and open the section heading that says **Resources for Assistors**. Then, follow the instructions on the document labeled **NYSOH Assistors – Creating Your NY.gov**.*
2. Have received an email with your *unique invitation code*
 - *Once you have completed training please allow approximately 1 week to receive the email.*
 - *The email will be from no-reply@info.nystateofhealth.ny.gov.*
 - *If you do not receive this email in the expected time frame, and you have verified that it is not in your spam or junk folder, you may either email or call the Department of Health for assistance.*
 - *You may email assistor.admin@health.ny.gov or call 518-473-0566.*
3. Know your agency's ID. This Agency ID will be received in an email from NYS Department of Health.
 - *Once you have completed training please allow approximately 1 week to receive the email.*
 - *The email will be from Assistor.Admin@health.ny.gov.*
 - *If you do not receive this email in the expected time frame, and you have verified that it is not in your spam or junk folder, you may either email or call the Department of Health for assistance.*
 - *You may email assistor.admin@health.ny.gov or call 518-473-0566.*

Steps for Creating your NY State of Health Assistor Account:

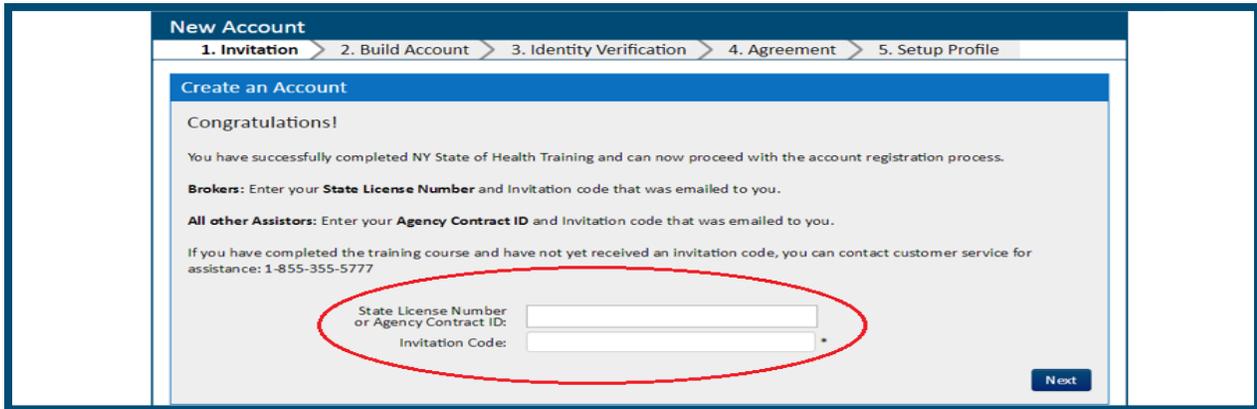
- Click on the link below, or enter it into your web browser:
<https://nystateofhealth.ny.gov/agent/assisors>
- Click on Returning Users **CLICK HERE TO LOGIN** with your NYS.GOV ID.



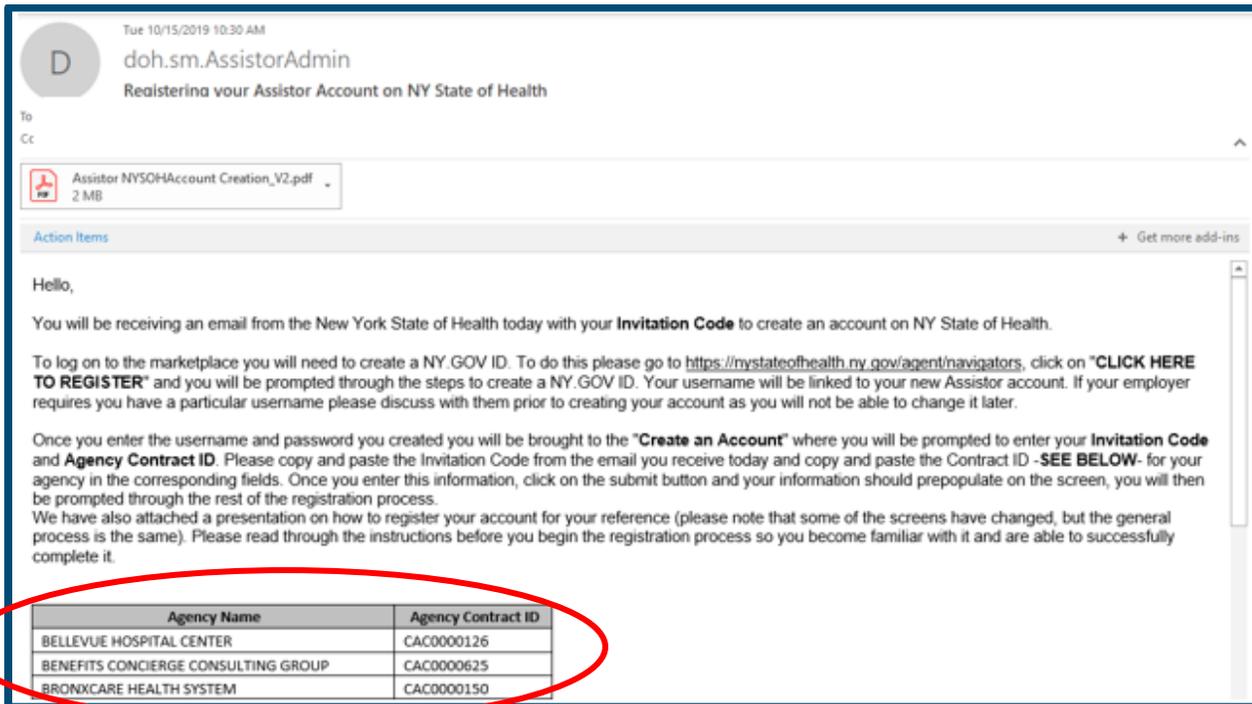
- Enter your NY.gov **Username** and **Password**.
- Click **Sign In**.



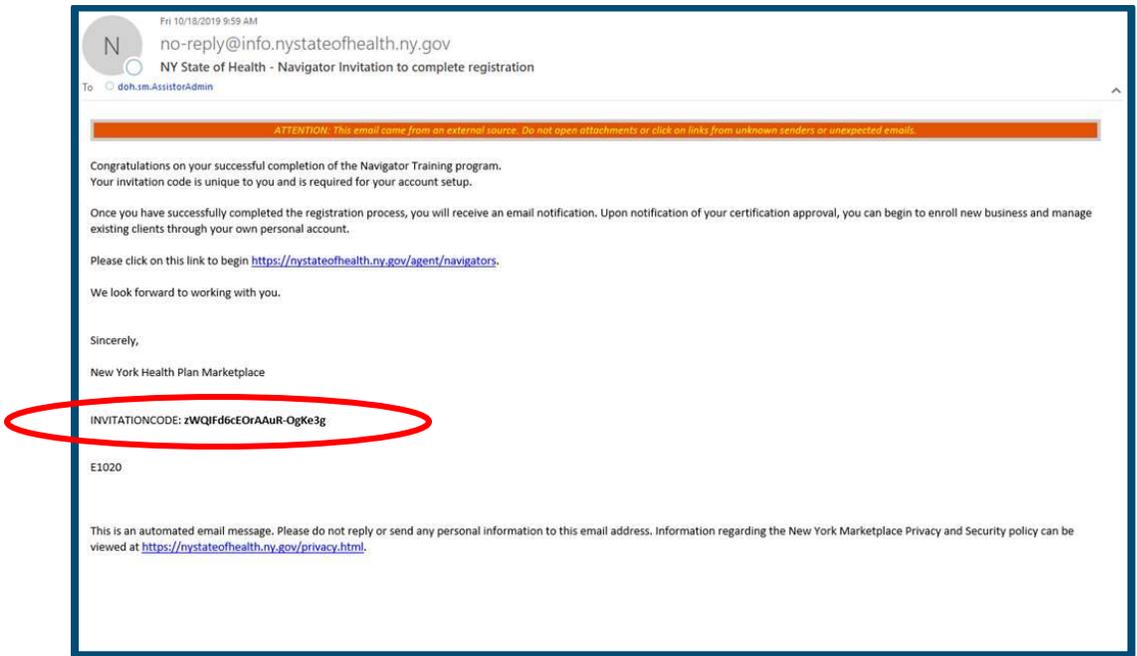
- You will be navigated to the **Invitation** tab on the **Create an Account** screen and asked to input your **Agency ID** and **Invitation Code**.



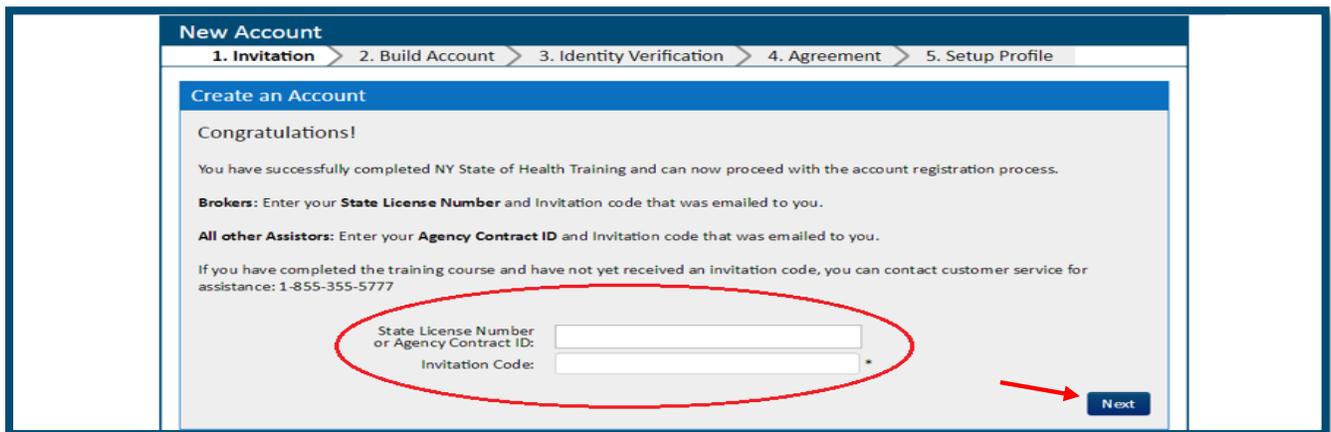
- Input your **Agency's ID** into the screen above. Copy and paste the Agency Contract ID from your email to avoid input errors.
 - The email will be from Assistor.Admin@health.ny.gov.



- Input the **Invitation Code**. Copy and paste the invitation code from the email to avoid input errors.
 - *The email will be from no-reply@info.nystateofhealth.ny.gov.*



- Click **Next**.



- You will be navigated to the **Build Account** tab. Verify that any information which auto-populated is correct.
- Complete the **Legal Residence** fields. This should be your current residential address (where you live). Do NOT use a P.O. Box.
- Complete the **Mailing Address** fields. This should be the agency’s local address where you will be meeting with consumers. This address will appear to the public when they are searching for an Assistor, by location, to make an appointment.
- Complete the **Business Address** fields. This should be your agency’s main location.
- Complete the **Contact Info** fields. Please provide your work email address and work phone number. This can be either a cell phone or a landline. This information will appear to the public when they are searching for an Assistor to contact.
- Read and agree to the **Rules of Behavior for NY State of Health** and the **General Privacy Attestation**.
- Click **Create an Account**.

New Account

1. Invitation > **2. Build Account** > 3. Identity Verification > 4. Agreement > 5. Setup Profile

Create an Account

Account Information
Please provide the following contact information and communications preferences so we may verify your identity and set up your account.

Account Holder

First Name: Nick
 Middle Name:
 Last Name: Johnston
 Suffix: --Select--

Contact Info

E-mail Address: nick.johnston@health.ny.gov
 Primary Phone Number: [] [] [] X [] Select
 Preferred Phone Number: --Select-- *Add Another Number*

Agreement

I have read and agreed to Rules of Behavior for NY State of Health
 I agree with the General Privacy Attestation

Legal Residence

Address Line 1: Address Line 1
 Address Line 2: Address Line 2
 City: City
 Zip: Zip State: State

Mailing Address *Some as residence*

Address Line 1: Address Line 1
 Address Line 2: Address Line 2
 City: City
 Zip: Zip State: State

Business Address *Some as residence*

Address Line 1: Address Line 1
 Address Line 2: Address Line 2
 City: City
 Zip: Zip State: State

Create an Account

- You will see a Pop-up message which asks you to check the mailing address that you entered.
- The online address validation process takes the address as entered and standardizes it to meet the standard mailing guidelines for the US Postal Service.
 - For example, the extra 4 digits of the zip code may be added.
- Check the **Suggested Address** carefully to make sure it is correct. If it is correct, click on the **Suggested Address**, and then click **Use this as Mailing Address**.
 - If it is not correct, you may click **Cancel** to go back and update the address.
- This process will then be repeated for the **Primary Business Address**, and the **Residential Address**.

Check Your Address

NY State of Health checks the addresses in your application with the United States Postal Service. You will be asked to confirm the addresses when you set up your account and will need to reconfirm any addresses that are later changed.

Mailing Address >

Primary Business Address

Residential Address

Mailing Address

We found a more complete version of the Mailing Address. Pick the address you want to use. Click on "Use this as Mailing Address" to confirm the address. Click "Cancel" to edit the address you entered.

Original Address

1 Commerce Plaza
12th Floor
Albany, NY 12210

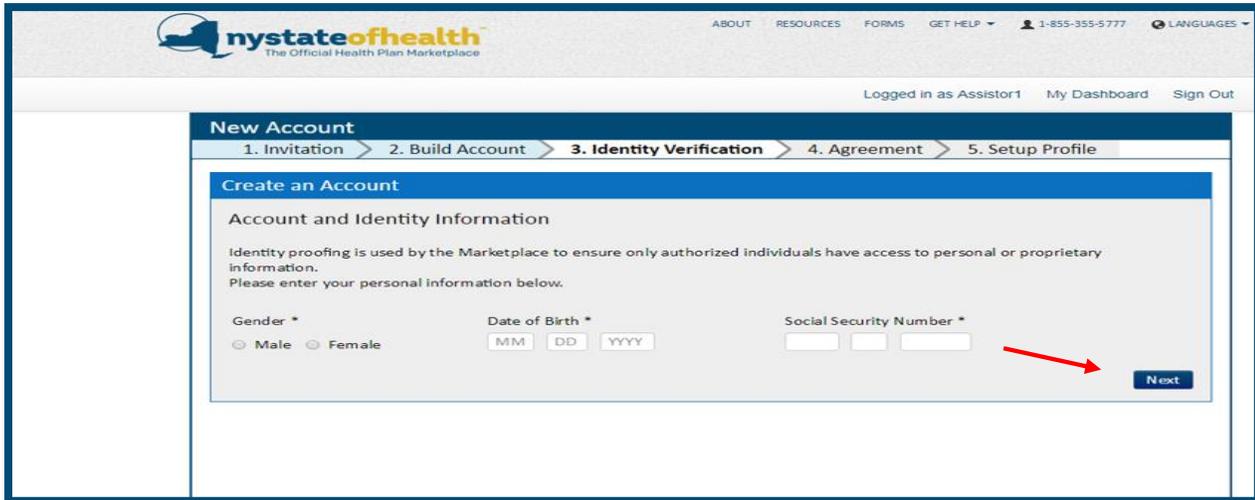
Suggested Address

1 Commerce Plz Fl 12
Albany, NY 12210-2822

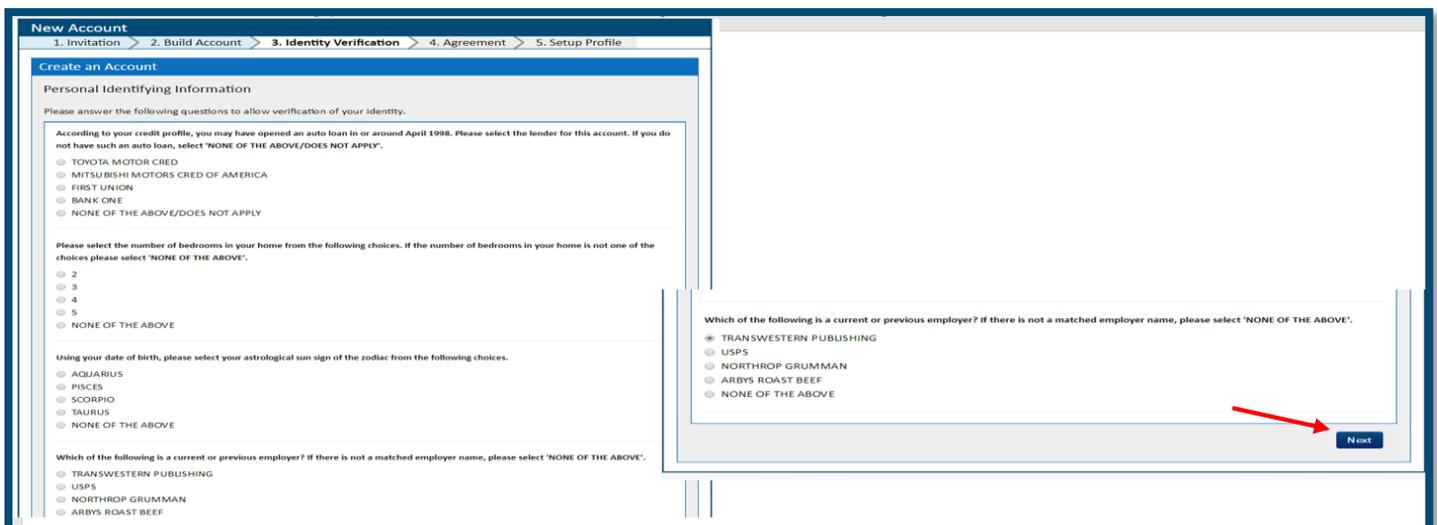
Use this as Mailing Address

Cancel

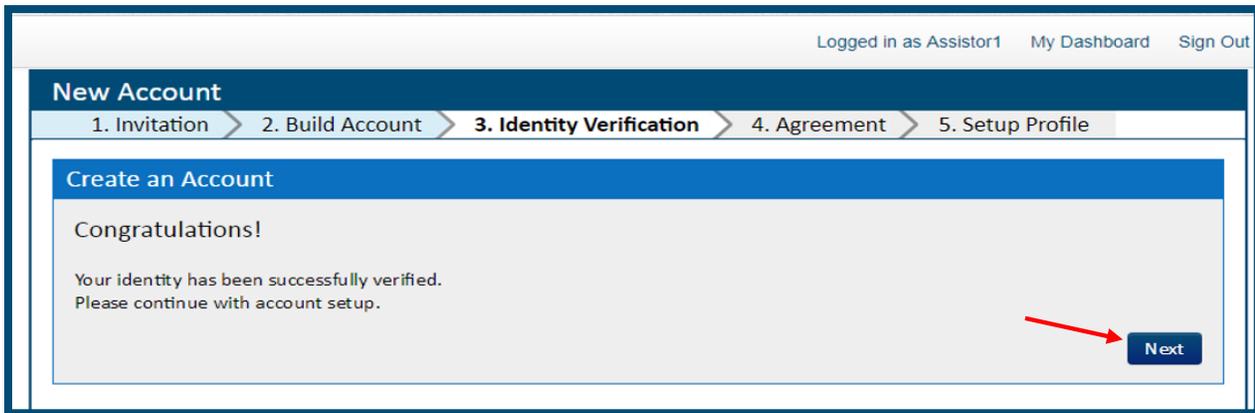
- You will be navigated to the **Identity Verification** tab.
- Select your **Gender**.
- Enter your **Date of Birth** and **Social Security Number**. Enter your information exactly and as it appears on your Social Security Card.
- Click **Next**.



- Additional identity proofing may be required in the form of a series of 3-5 personal identifying questions. Answer the questions and click **Next**.

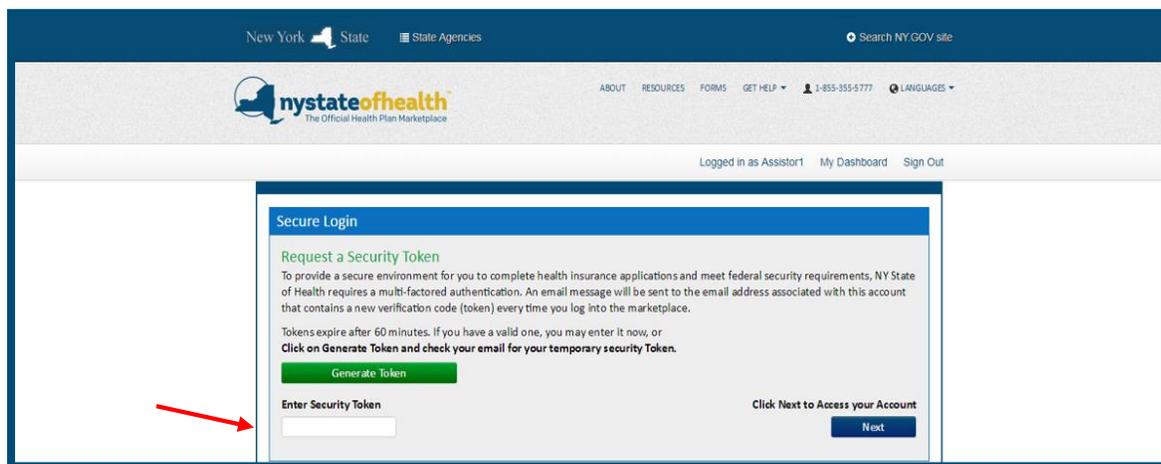


- Upon successful completion of identity proofing, a “Congratulations!” message screen will display, click **Next**.



If Identity Proofing is not successful, send an email to Assistor.Admin@health.ny.gov.

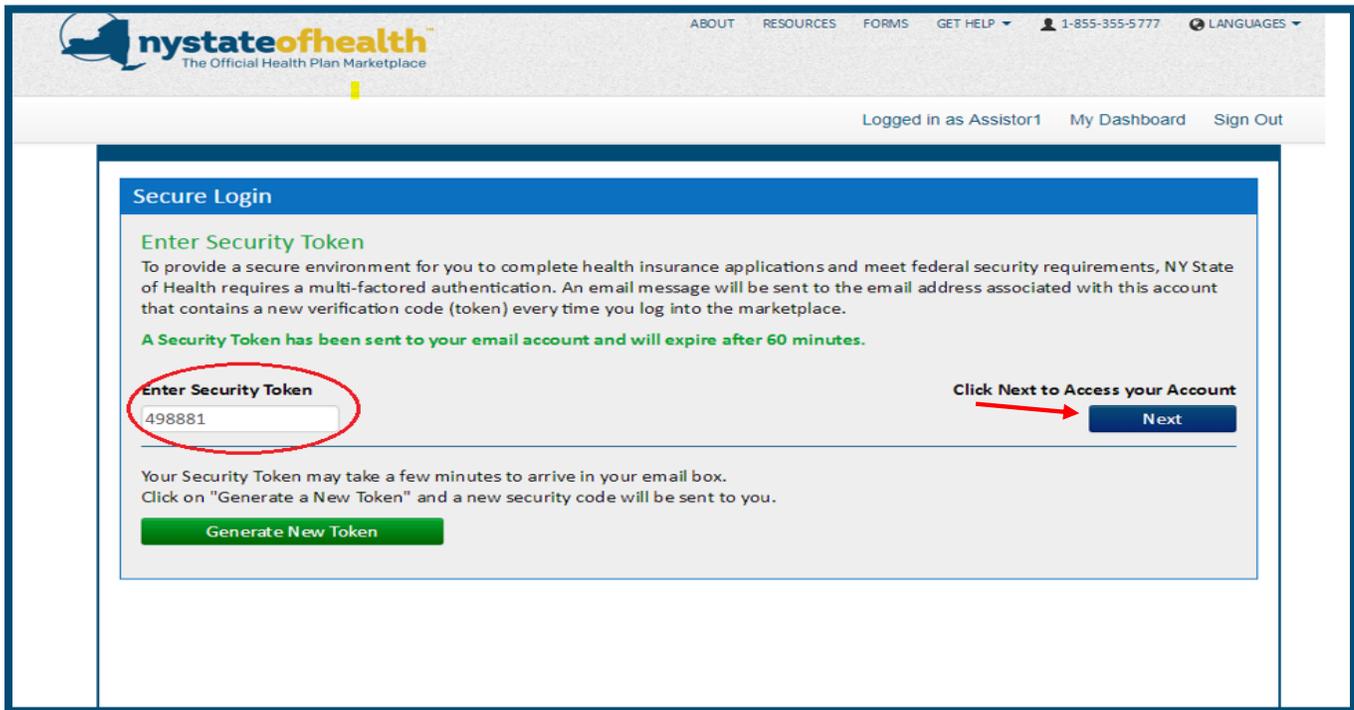
- You will be navigated to the **Secure Login** screen.
- Click **Generate Token**. You will need to generate a new token **each** time you log on to the portal.



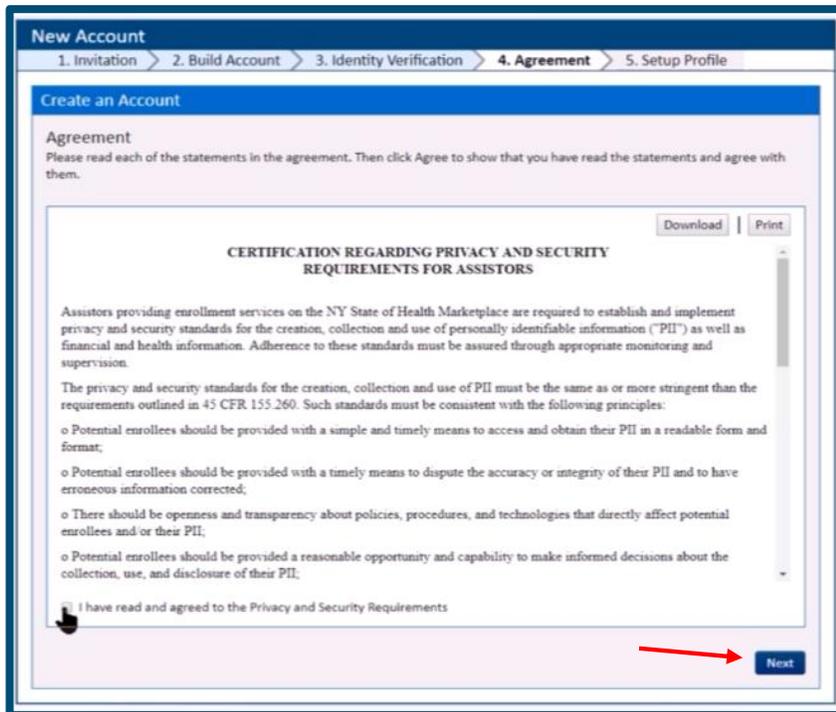
- You will need to check your email account to retrieve the email message sent containing the token.



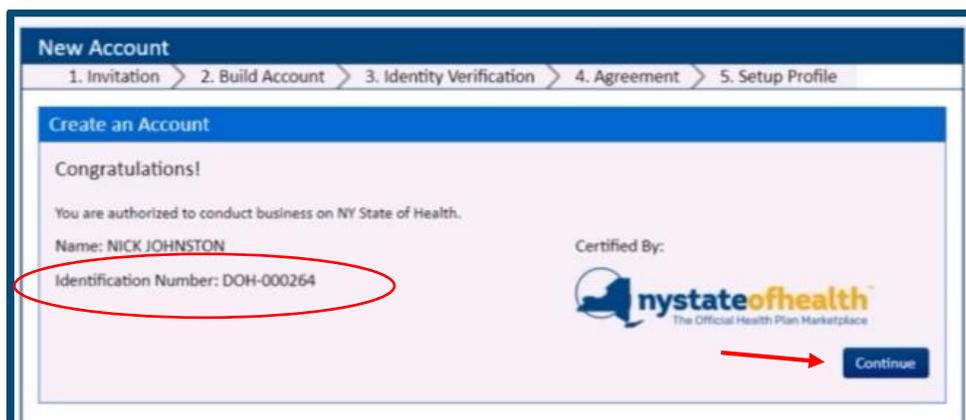
- Once the token has been obtained, enter it into the **Enter Security Token** field and click **Next**.



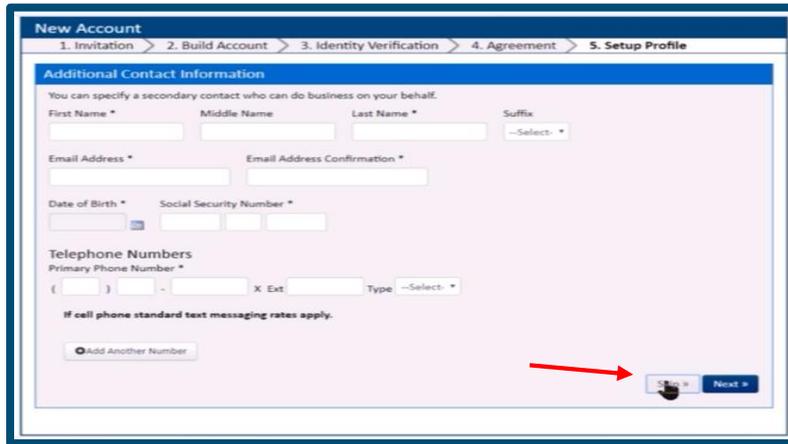
- You will be navigated to the **Agreement** tab.
- Read each of the statements in the agreement.
- Check the checkbox next to the statement **I have read and agreed to the Privacy and Security Requirements.**
- Click **Next**.



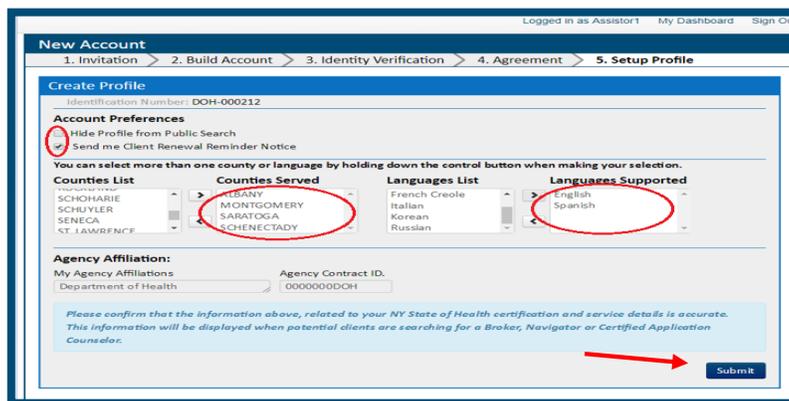
- You will receive a **Congratulations!** message that you are authorized to conduct business on NY State of Health. You will be given your **Identification Number**, which is the same as your *Certification Number*.
- Click **Continue**.



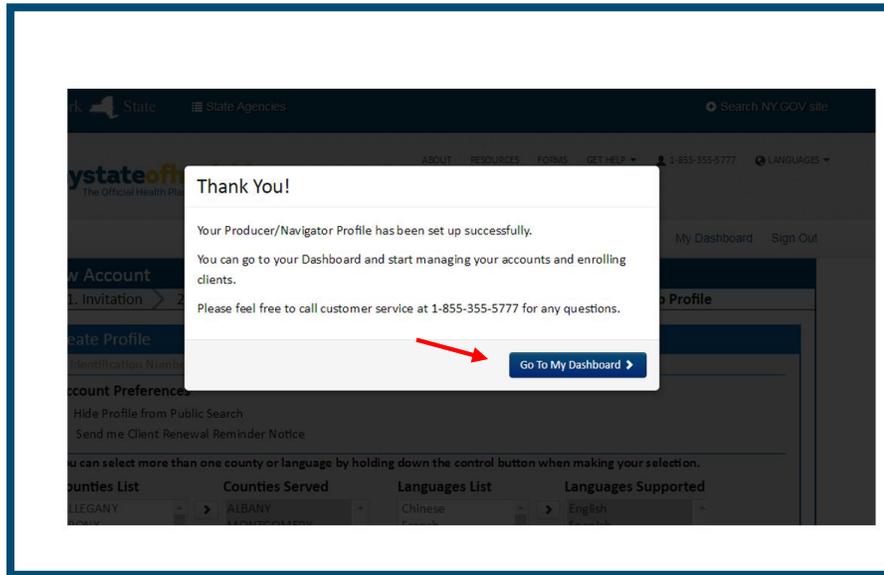
- You will be navigated to the **Setup Profile** tab where there are fields to provide a secondary contact.
- This field is not for Assistors. Click **Skip**.



- Select your **Account Preferences**.
 - If you check **Hide Profile from Public Search**, the Marketplace will **not** be able to find you to transfer or assign a consumer’s account to you.
 - If you check **Send me Client Renewal Reminder Notice**, you will receive notices to the **My Inbox** tab of your Assistor Dashboard. These notices will provide you with a list of accounts on your dashboard which are due to renew in the upcoming and subsequent months.
- Select the counties you serve (**Counties Served**) from the **Counties List**.
 - This should reflect the counties in which you are able to provide application assistance.
- Select the languages you support (**Languages Supported**) from the **Languages List**.
- Click **Submit**.



- You have now successfully set up your Assistor Profile.
- Click **Go To My Dashboard**.



- Your **Dashboard** screen will now be displayed.
- At the upper left-hand corner of your dashboard screen, you will see your **Account Number** and underneath that, your **Certification Number**.
- To edit your account information, click on the **My Profile** tab.
- To see a list of your current clients, click on the **My Clients** tab, then click on the **Individual** tab and select your **Associated Agency** from the drop-down list.
- To **add** an individual, follow the steps above to see the list of current clients, and then click **Add Individual**.

