

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

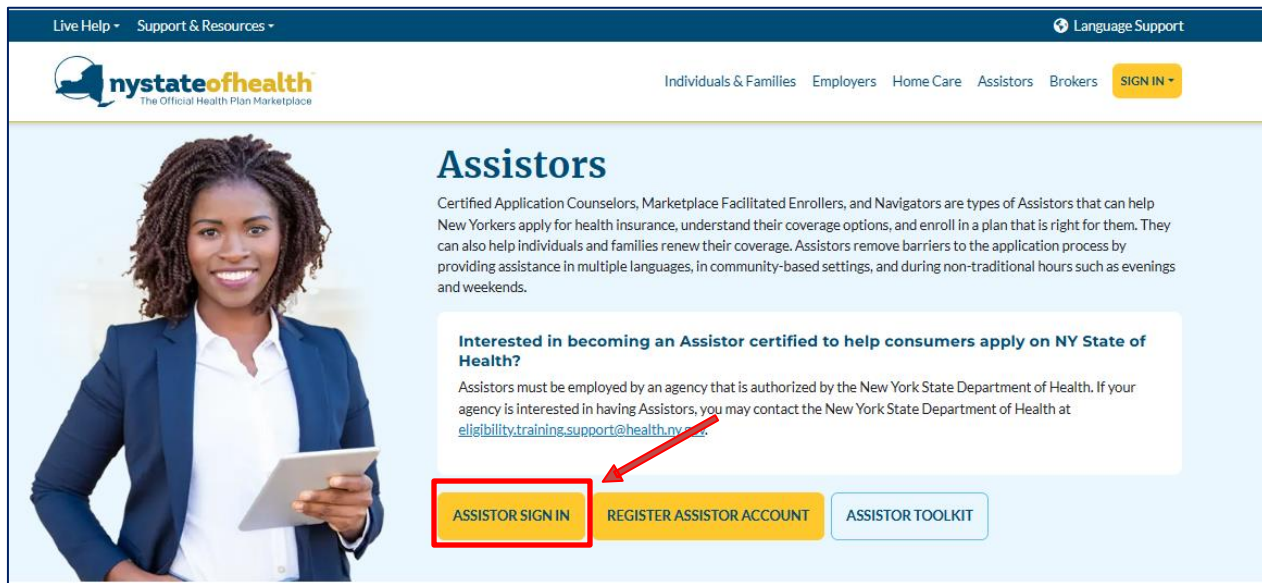
This is a step-by-step guide to help Assistors set up their account. Assistors must successfully complete certification training and then create their account with NY State of Health in order to gain access to their Assistor Dashboard.

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 **ASSISTOR SIGN IN**, agree to the rule of behavior and sign in with your NYS.GOV ID.



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

A screenshot of the NY.GOV ID login form. The form has a header with a lock icon and the text 'NY.GOV ID' and 'Secure Access to New York State Services'. Below this are two input fields: 'Username' with the text 'Assistor1' and 'Password' with masked characters. A red box highlights the 'Sign In' button, with a red arrow pointing to it from the right. Below the button are three links: 'Forgot Username? or Forgot Password?', 'Create an Account', and 'Need help? Get Assistance'. At the bottom, a disclaimer states: 'This site is protected by reCAPTCHA and the Google Privacy Policy and Terms of Service apply.'

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

New Account

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

Create an Account

Congratulations!

You have successfully completed NY State of Health Training and can now proceed with the account registration process.

Brokers: Enter your **State License Number** and Invitation code that was emailed to you.

All other Assistors: Enter your **Agency Contract ID** and Invitation code that was emailed to you.

If you have completed the training course and have not yet received an invitation code, you can contact customer service for assistance: 1-855-355-5777

State License Number or Agency Contract ID:

Invitation Code:

Next

- 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 AssistorAdmin@health.ny.gov.

Tue 10/15/2019 10:30 AM

doh.sm.AssistorAdmin

Registering your Assistor Account on NY State of Health

To

Cc

Assistor NYSOHA Account Creation_V2.pdf
2 MB

Action Items

Get more add-ins

Hello,

You will be receiving an email from the New York State of Health today with your **Invitation Code** to create an account on NY State of Health.

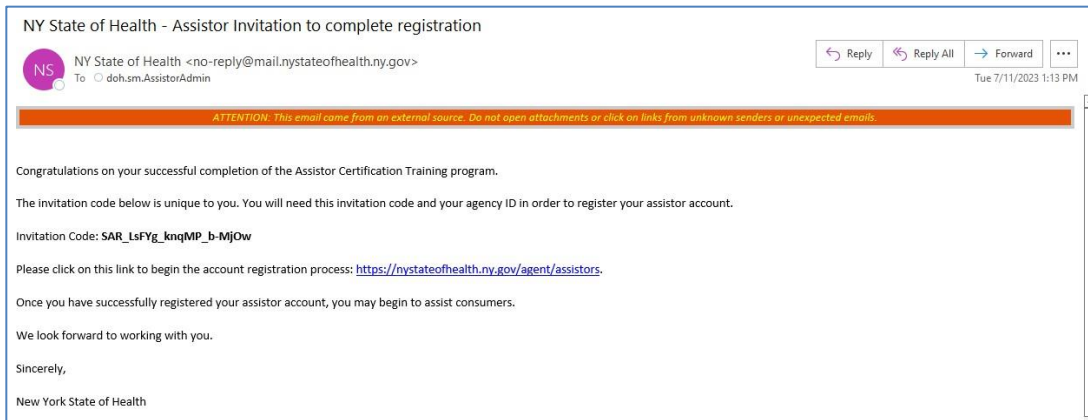
To log on to the marketplace you will need to create a NY.GOV ID. To do this please go to <https://nystateofhealth.ny.gov/agent/navigators>, click on "CLICK HERE TO REGISTER" and you will be prompted through the steps to create a NY.GOV ID. Your username will be linked to your new Assistor account. If your employer requires you have a particular username please discuss with them prior to creating your account as you will not be able to change it later.

Once you enter the username and password you created you will be brought to the "Create an Account" where you will be prompted to enter your **Invitation Code** and **Agency Contract ID**. Please copy and paste the Invitation Code from the email you receive today and copy and paste the Contract ID - **SEE BELOW** - for your agency in the corresponding fields. Once you enter this information, click on the submit button and your information should prepopulate on the screen, you will then be prompted through the rest of the registration process.

We have also attached a presentation on how to register your account for your reference (please note that some of the screens have changed, but the general process is the same). Please read through the instructions before you begin the registration process so you become familiar with it and are able to successfully complete it.

Agency Name	Agency Contract ID
BELLEVUE HOSPITAL CENTER	CAC0000126
BENEFITS CONCIERGE CONSULTING GROUP	CAC0000625
BRONXCARE HEALTH SYSTEM	CAC0000150

- 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**.

Create an Account

Congratulations!

You have successfully completed NY State of Health Training and can now proceed with the account registration process.

Brokers: Enter your **State License Number** and Invitation code that was emailed to you.

All other Assistors: Enter your **Agency Contract ID** and Invitation code that was emailed to you.

If you have completed the training course and have not yet received an invitation code, you can contact customer service for assistance: 1-855-355-5777

State License Number or Agency Contract ID: CAC0000998

Invitation Code: z8OQTCOwmKtCzPK9Ov94fw *

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**.

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:
Middle Name:
Last Name:
Suffix:

Legal Residence

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

Contact Info

E-mail Address: *
Primary Phone Number: X Select *
[Add Another Number](#)
Preferred Phone Number: *

Agreement

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

Mailing Address ☐ Same as residence

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

Business Address ☐ Same as residence

Address Line 1: *
Address Line 2:
City: *
Zip: * 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

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 **Sex**.
- Enter your **Date of Birth** and **Social Security Number**. Enter your information exactly and as it appears on your Social Security Card.
- Click **Next**.

New Account

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

Create an Account

Identifying Information

Identity proofing is used by the Marketplace to ensure only authorized individuals have access to personal or proprietary information. Please enter your personal information below.

Sex *

☐ Male ☐ Female ☐ X

Date of Birth *

MM DD YYYY

Social Security Number *

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**.

New Account

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

Create an Account

Personal Identifying Information

Please answer the following questions to allow verification of your identity.

According to your credit profile, you may have opened an auto loan in or around April 1998. Please select the lender for this account. If you do not have such an auto loan, select 'NONE OF THE ABOVE/DOES NOT APPLY'.

☐ TOYOTA MOTOR CRED
☐ MITSUBISHI MOTORS CRED OF AMERICA
☐ FIRST UNION
☐ BANK ONE
☐ NONE OF THE ABOVE/DOES NOT APPLY

Please select the number of bedrooms in your home from the following choices. If the number of bedrooms in your home is not one of the choices please select 'NONE OF THE ABOVE'.

☐ 2
☐ 3
☐ 4
☐ 5
☐ NONE OF THE ABOVE

Using your date of birth, please select your astrological sun sign of the zodiac from the following choices.

☐ AQUARIUS
☐ PISCES
☐ SCORPIO
☐ TAURUS
☐ NONE OF THE ABOVE

Which of the following is a current or previous employer? If there is not a matched employer name, please select 'NONE OF THE ABOVE'.

☐ TRANSWESTERN PUBLISHING
☐ USPS
☐ NORTHROP GRUMMAN
☐ ARBYS ROAST BEEF
☐ NONE OF THE ABOVE

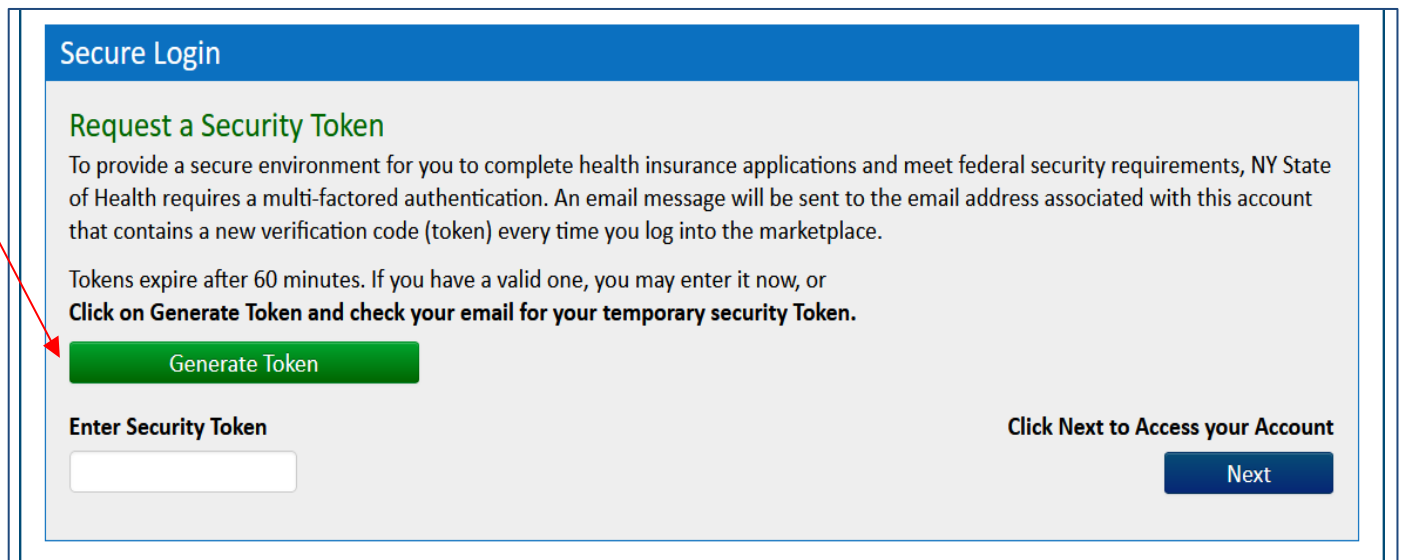
Next

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

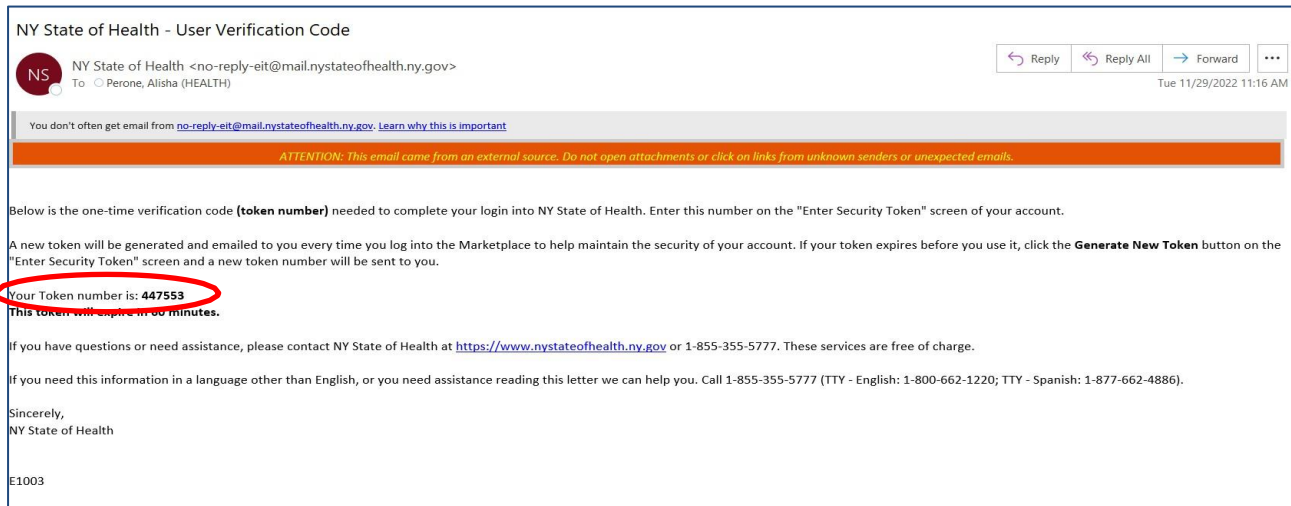


If Identity Proofing is not successful, send an email to Eligibility.Training.Support@health.ny.gov.

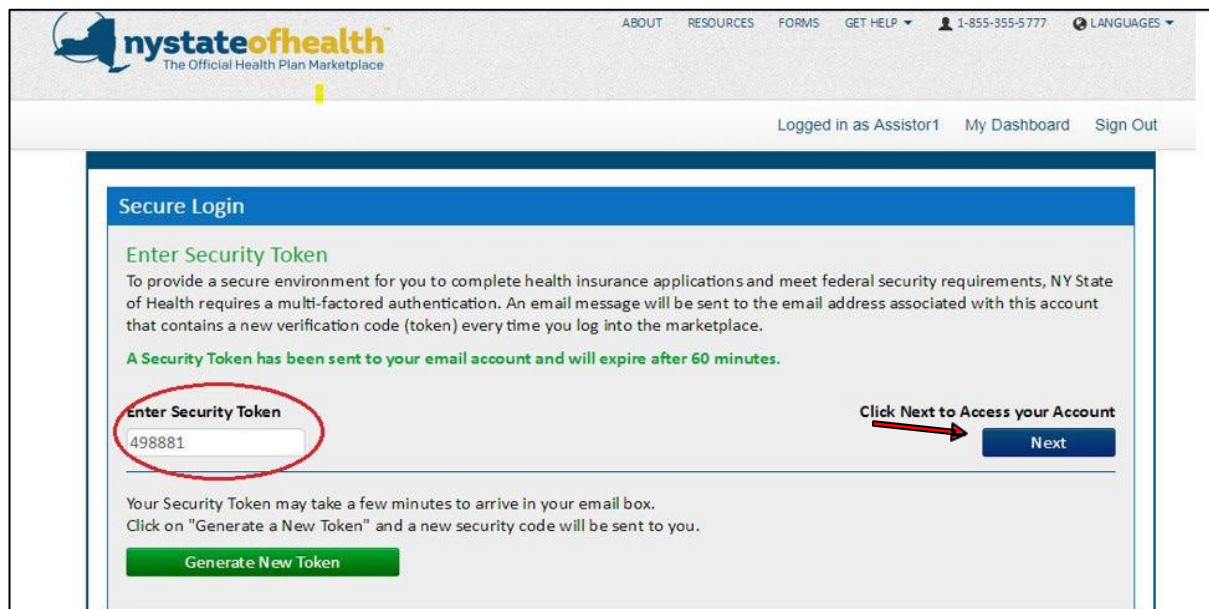
- You will be navigated to the **Secure Login** screen.
- Click **Generate Token**. You will need to generate a new token **each** time you log on to the portal.



- 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.
- Be sure to scroll all the way down to the bottom within the agreement, in order to activate the “Next” button.
- Check the checkbox next to the statement **I have read and agreed to the Privacy and Security Requirements.**
- Click **Next**.

New Account

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

Create an Account

Agreement
Please read each of the statements in the agreement. Then click Agree to show that you have read the statements and agree with them.

Download | Print

CERTIFICATION REGARDING PRIVACY AND SECURITY REQUIREMENTS FOR ASSISTORS

Assistors providing enrollment services on the NY State of Health Marketplace are required to establish and implement privacy and security standards for the creation, collection and use of personally identifiable information ("PII") as well as financial and health information. Adherence to these standards must be assured through appropriate monitoring and supervision.

The privacy and security standards for the creation, collection and use of PII must be the same as or more stringent than the requirements outlined in 45 CFR 155.260. Such standards must be consistent with the following principles:

- o Potential enrollees should be provided with a simple and timely means to access and obtain their PII in a readable form and format;
- o Potential enrollees should be provided with a timely means to dispute the accuracy or integrity of their PII and to have erroneous information corrected;
- o There should be openness and transparency about policies, procedures, and technologies that directly affect potential enrollees and/or their PII;
- o Potential enrollees should be provided a reasonable opportunity and capability to make informed decisions about the collection, use, and disclosure of their PII.

☒ I have read and agreed to the Privacy and Security Requirements

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**.

New Account

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

Create an Account


Congratulations!

You are authorized to conduct business on NY State of Health.

Name: NYDYHA TESTASSISTOR

Identification Number: 998-000562

Certified By:

 **nystateofhealth**
The Official Health Plan Marketplace

Continue

- You will be navigated to the **Setup Profile** tab.
- Select your **Account Preferences**.
 - If you check **Hide Profile from All Searches**, that means that you will not appear as an Assistor on the public search. A consumer logged in with their NY.gov username will not be able to select you as their Assistor and the Call Center will not be able to find you as an Assistor to add you to a consumer's account.
 - If you check **Hide Profile from Public Search**, that also means that you will not appear as an Assistor on the public search. However, A consumer logged in with their NY.gov username will be able to select you as their Assistor. Also, the Call Center will be able to find you as an Assistor to add you to a consumer's account.
 - 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**.

New Account

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

Create Profile

Identification Number: 998-000441

Account Preferences

☐ Hide Profile from All Searches

☐ Hide Profile from Public Search

☒ Send me Client Renewal Reminder Notice

You can select more than one county or language by holding down the control button when making your selection.

Counties List **Counties Served** **Languages List** **Languages Supported**

ALBANY
ALLEGANY
BRONX
BROOME

Chinese
English
French
French Creole

Agency Affiliation:

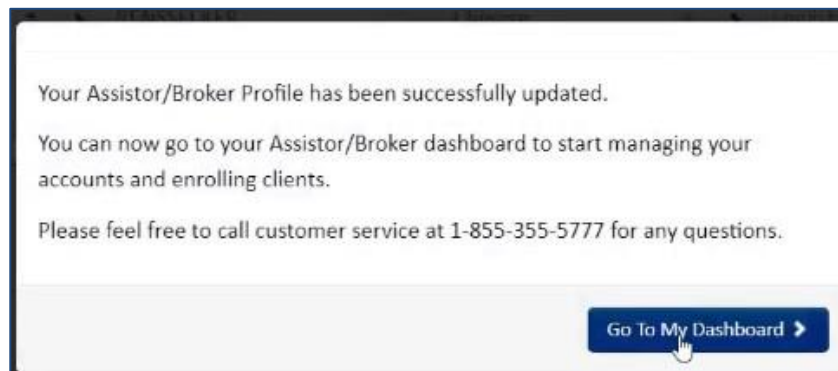
Agency Affiliation

My Agency Affiliations: NYS DOH Agency Contract ID.: CAC0000998

Please confirm that the information above, related to your NY State of Health certification and service details is accurate. This information will be displayed when potential clients are searching for a Broker, Navigator or Certified Application Counselor.

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**.

