

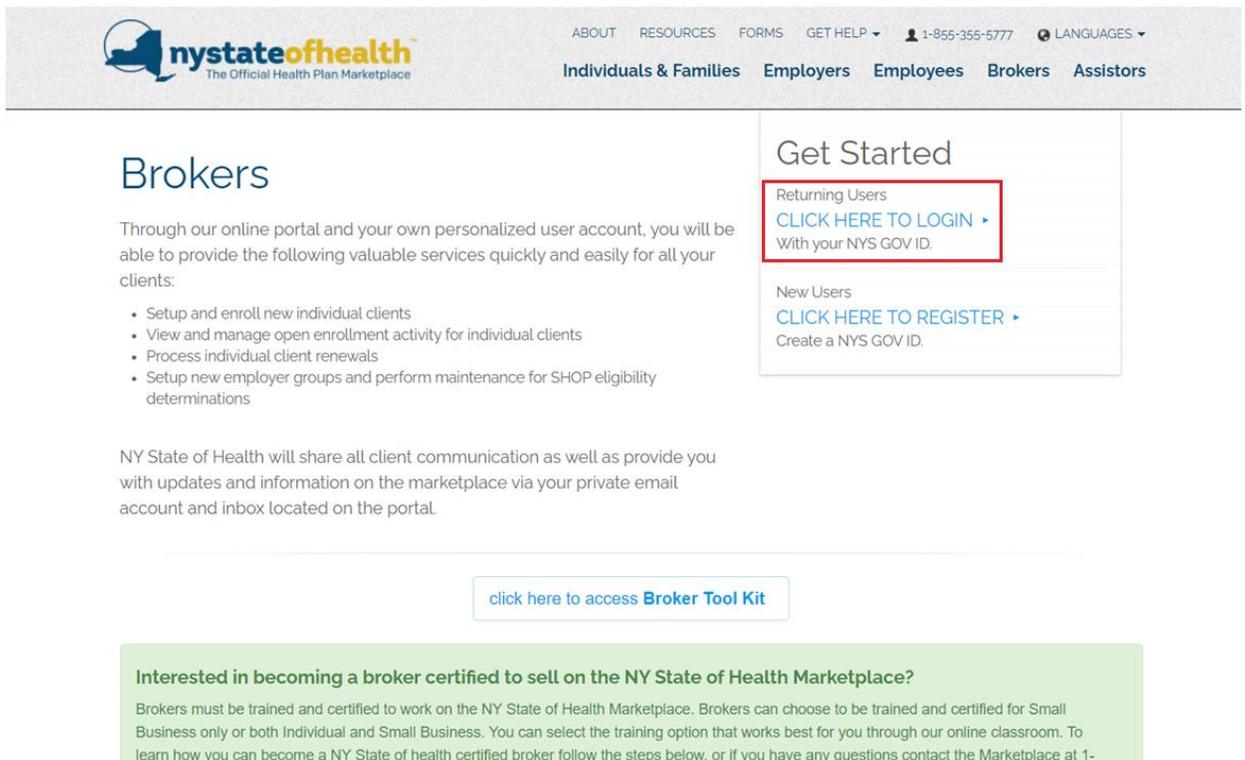
NYSOH Broker Certification - Step 2: Identity Proofing and Licensing

All NYSOH brokers must pass identity proofing and license check as part of their broker account set up. Identity Proofing is done based on *personal* information entered. License verification is completed in real time with the Department of Financial Services (DFS).

1. Once an NY.Gov ID is set, log in to <https://nystateofhealth.ny.gov>. Click **Broker** in the upper right-hand corner.



2. On the Broker Portal sign-on page, click [CLICK HERE TO LOGIN >](#) with the newly created NY.Gov ID.

A screenshot of the NYSOH Broker Portal sign-on page. The header is identical to the previous image. The main content area has a heading 'Brokers' and a paragraph: 'Through our online portal and your own personalized user account, you will be able to provide the following valuable services quickly and easily for all your clients:'. Below this is a bulleted list of services: 'Setup and enroll new individual clients', 'View and manage open enrollment activity for individual clients', 'Process individual client renewals', and 'Setup new employer groups and perform maintenance for SHOP eligibility determinations'. To the right is a 'Get Started' section with two options: 'Returning Users' with a red-bordered box around the 'CLICK HERE TO LOGIN >' link and the text 'With your NYS GOV ID.', and 'New Users' with a 'CLICK HERE TO REGISTER >' link and the text 'Create a NYS GOV ID.'. Below the main content is a button that says 'click here to access Broker Tool Kit'. At the bottom is a green box with the heading 'Interested in becoming a broker certified to sell on the NY State of Health Marketplace?' and a paragraph of text: 'Brokers must be trained and certified to work on the NY State of Health Marketplace. Brokers can choose to be trained and certified for Small Business only or both Individual and Small Business. You can select the training option that works best for you through our online classroom. To learn how you can become a NY State of health certified broker follow the steps below, or if you have any questions contact the Marketplace at 1-...'.

3. On the *New Account* setup screen, check the **attestation box** and enter the digits from your NYS License Number. Click **Next**.

New Account

1. Account Setup > 2. Verification > 3. NYS License > 4. Agreement > 5. Certification > 6. Setup Profile

New York State License

Duplicate License Check

Please begin by entering your NY State Department of Financial Services Broker or Agent License Number.
Please only enter the numerical portion of your license (Do not include LA-, LB-, etc.).

I attest that I am duly licensed by the NYS Department of Financial Services to sell Health Insurance in NYS.

State License Number (e.g.: 123456):

4. Next, the *Account Setup* screen will display information carried over from NY.Gov. Complete **all** fields on the screen for Identity Proofing purposes. The Agreements at the bottom of the page must also be reviewed and attested. Click the blue link ([Terms of Service](#), [General Privacy Attestation](#)) for each to open in separate windows. Both can be downloaded and/or printed. Click the **checkbox** to attest that they have been reviewed. Click **Next** once complete.

New Account

1. Account Setup > 2. Verification > 3. NYS License > 4. Agreement > 5. Certification > 6. Setup Profile

Account Setup

Instructions: Please provide the following information and communication preferences so we may verify your identity and set up your account. If you have any questions please feel free to call customer service at 1-855-355-5777 or email us directly at: NYSOHbrokersupport@health.ny.gov.

Account Holder <i>As displayed on your Government ID</i>	Personal Info <i>For Identity Proofing</i>
First Name: Alex *	Sex: <input type="radio"/> Male <input checked="" type="radio"/> Female
Middle Name: *	Date of Birth: 06 25 1976 *
Last Name: Brokerton *	Social Security Number: *** ** 1976 *
Suffix: --Select- v	

Contact Info	Legal Residence <i>As displayed on your Government ID</i>
E-mail Address: example.123456@outlook.com *	Address Line 1: 327 Mutt St *
Primary Phone Number: 518 555 2132 X Cell v *	Address Line 2: Penthouse
Preferred Phone Number: Cell v * Add Another Number	City: Albany *
	Zip: 12207 * State: NY

Business Address <i>Same as Legal Residence</i> <input type="checkbox"/>	Mailing Address <i>Same as Legal Residence</i> <input type="checkbox"/>
Address Line 1: 890 Hoffman Tpk *	Address Line 1: PO Box 123 *
Address Line 2: Ste 102	Address Line 2: Address Line 2
City: Albany *	City: Albany *
Zip: 12208 * State: NY	Zip: 12207 * State: NY

Agreement

Identity proofing is used by the Marketplace to ensure only authorized individuals have access to personal or proprietary information. NY State of Health will verify your identity with the information you have provided. You will not be allowed to manage client information unless you are a NYSOH Certified Broker.

I have read and agreed to terms and service
 I agree with the General Privacy Attestation

Next

5. The Create Account screen displays Experian questions based on the information entered on the previous screen. All questions must be answered correctly. Click the **Next** button when finished.

New Account

1. Account Setup > 2. Verification > 3. NYS License > 4. Agreement > 5. Certification > 6. 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.

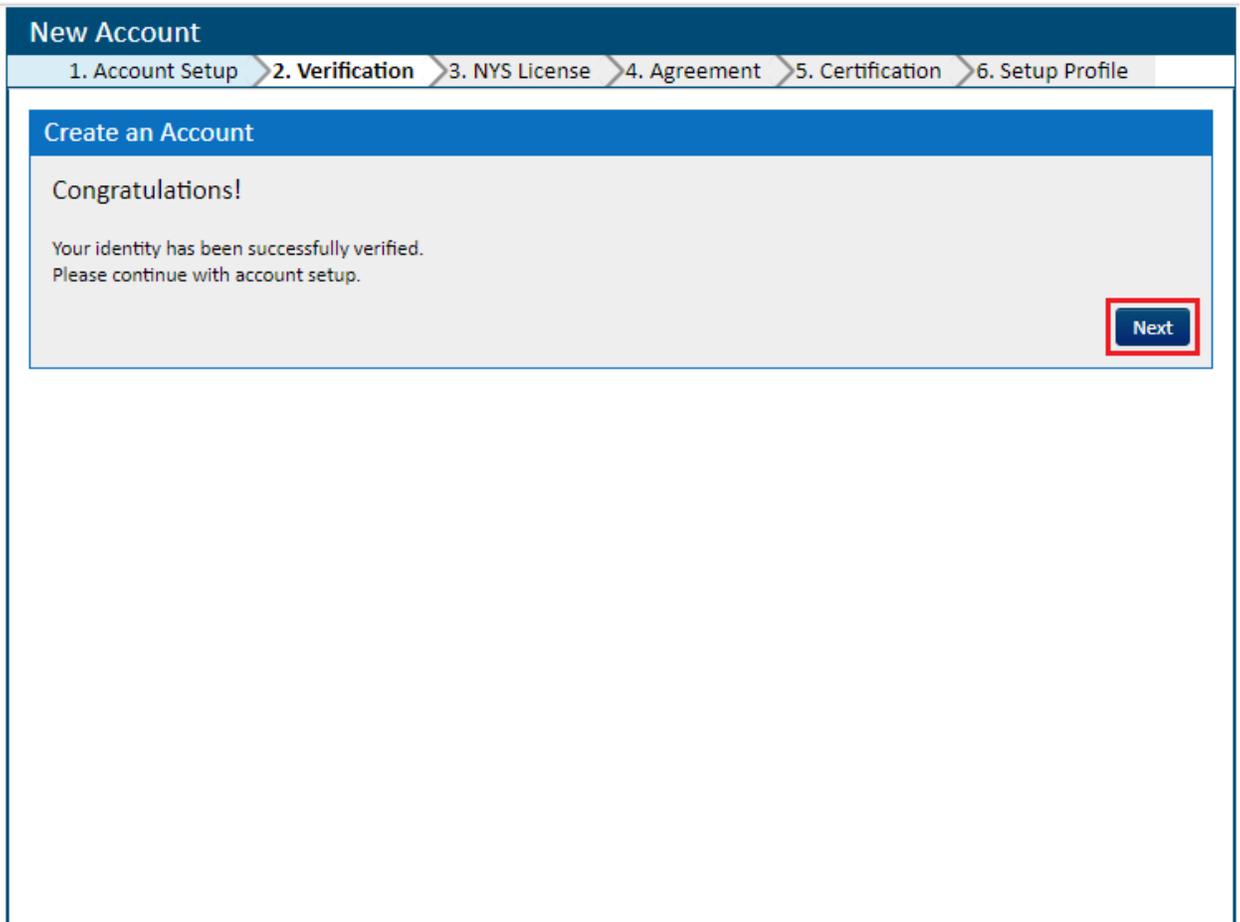
- AQUARIUS
- PISCES
- SCORPIO
- TAURUS
- NONE OF THE ABOVE

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

- 2
- 3
- 4
- 5
- NONE OF THE ABOVE

Next

6. If Experian questions are answered correctly, the next screen will display a congratulations message that the account has been verified. Click **Next**.



- If account is not verified, an error message will display on the previous screen to call the Customer Service Center at 1-855-355-5777. You can also reach out for assistance to the NYSOH Broker BML Mailbox at: NYSOHbrokersupport@health.ny.gov.

- Next, click the Generate Token button to generate a security token. Tokens will expire after 60 minutes and cannot be reused. If access to the account is needed, a new token must be generated upon sign-in. The tokens go directly to the email on file.

Secure Login

Request a Security Token

To provide a secure environment for you to complete health insurance applications and meet federal security requirements, NY State of Health requires a multi-factored authentication. An email message will be sent to the email address associated with this account that contains a new verification code (token) every time you log into the marketplace.

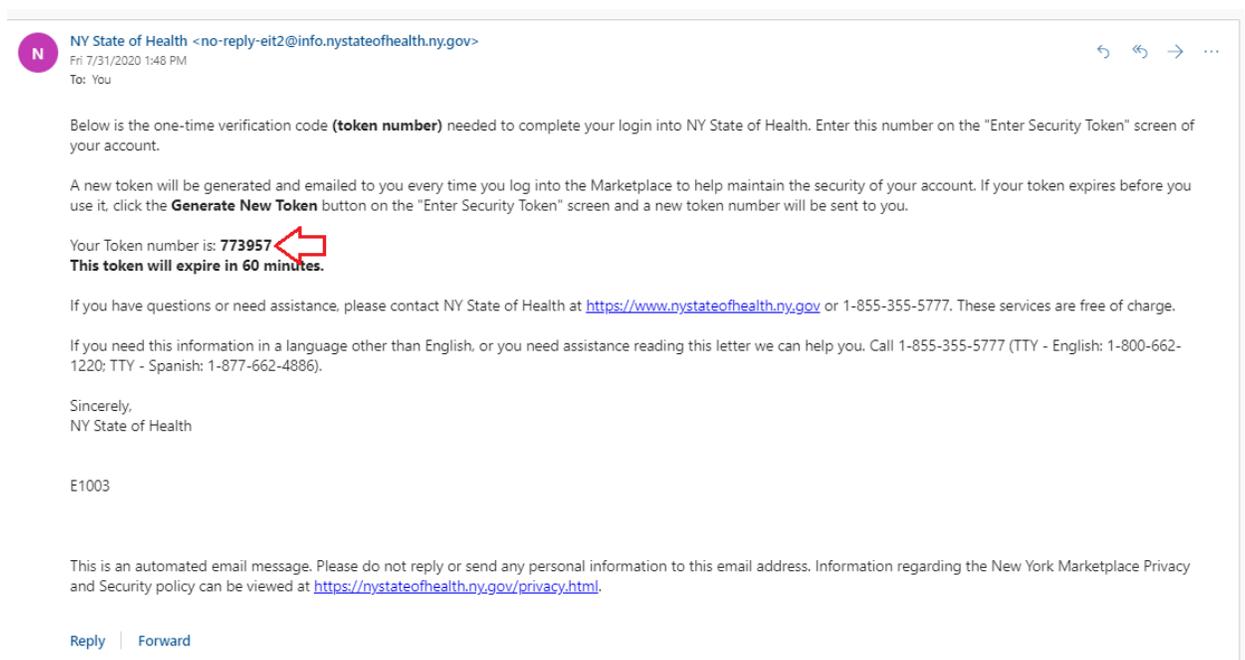
Tokens expire after 60 minutes. If you have a valid one, you may enter it now, or **Click on Generate Token and check your email for your temporary security Token.**

Generate Token

Enter Security Token Click Next to Access your Account

Next

- Find the email containing the token number and copy/paste it in to the Enter Security Token field.



- Once the Generate Token button is clicked, the button will change to "Generate New Token" in case the token is not received. Do not click button in haste or multiple times as multiple tokens could generate. Enter the security token from the email and click **Next**.

Secure Login

Enter Security Token

To provide a secure environment for you to complete health insurance applications and meet federal security requirements, NY State of Health requires a multi-factored authentication. An email message will be sent to the email address associated with this account that contains a new verification code (token) every time you log into the marketplace.

A Security Token has been sent to your email account and will expire after 60 minutes.

Enter Security Token

Click Next to Access your Account

Your Security Token may take a few minutes to arrive in your email box.
Click on "Generate a New Token" and a new security code will be sent to you.

- Next, verify that the State License Number and Social Security Number entered are correct. Edit the License Number if necessary. The Social Security Number cannot be edited as it was verified during the ID Proofing process. Click **Next**.

AC0000062608 - Alex Brokerton

1. Account Setup > 2. Verification > 3. NYS License > 4. Agreement > 5. Certification > 6. Setup Profile

New York State License

Identity Verification Complete.

Using the information you have already entered we will now validate your NYS License through the Department of Financial Services. Please verify all the information below is correct and then hit next to start the validation process. If you have any questions please feel free to email us directly at: NYSOHbrokersupport@health.ny.gov.

State License Number (e.g.: 123456): *

Social Security Number:

[Next](#)

9. Once the State License number is verified by the Department of Financial Services (DFS), the next screen will display a green checkmark that the information has been successfully verified.

The screenshot shows a web application interface for Alex Brokerton (AC0000062608). At the top, a dark blue header displays the user's name and ID. Below this is a light blue navigation bar with six steps: 1. Account Setup, 2. Verification, 3. NYS License (highlighted in blue), 4. Agreement, 5. Certification, and 6. Setup Profile. The main content area has a blue header for 'New York State License'. A green success message with a checkmark icon reads: 'Success. Your NY State License Number has been verified and your account information has been submitted. You are now eligible to take the required NY State of Health certification classes.' Below this, a grey box contains the following text: 'You will receive an email shortly with further instructions about obtaining your NY State of Health certification. If you do not receive this email or you have any questions, please call customer service at 1-855-355-5777 or email us directly at: NYSOHbrokersupport@health.ny.gov. Once you have completed the required courses and received notice that you have been certified, you can log back into NY State of Health to continue the application.'

- Now, the NYSOH will send the information to the Certification Administrator and an email will be sent inviting you to take Certification Training Courses for the NYSOH Small Business Marketplace (SHOP) and the Individual Marketplace. This email could take 2-3 days.
- If the email for training courses is not received, be sure to check your junk folder. If still not received, inquire at: NYSOHbrokersupport@health.ny.gov.

***Continue to the next User Guide:
NYSOH Broker Certification – Step 3: Training Courses**