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

![New Account setup screen](image-url)

- **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):** [23456780]

- **Next**
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.
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.
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.
7. 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.

- Find the email containing the token number and copy/paste it into 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**.
8. 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**.
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.

- 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*