

NYSOH Broker Certification – Step 4: Profile Setup

After the Certification Courses are completed, it could take up to 2-3 days for the account to update with the completed status. If you log in after 3 days and are still not able to proceed, reach out to the Broker Support BML directly at NYSOHbrokersupport@health.ny.gov.

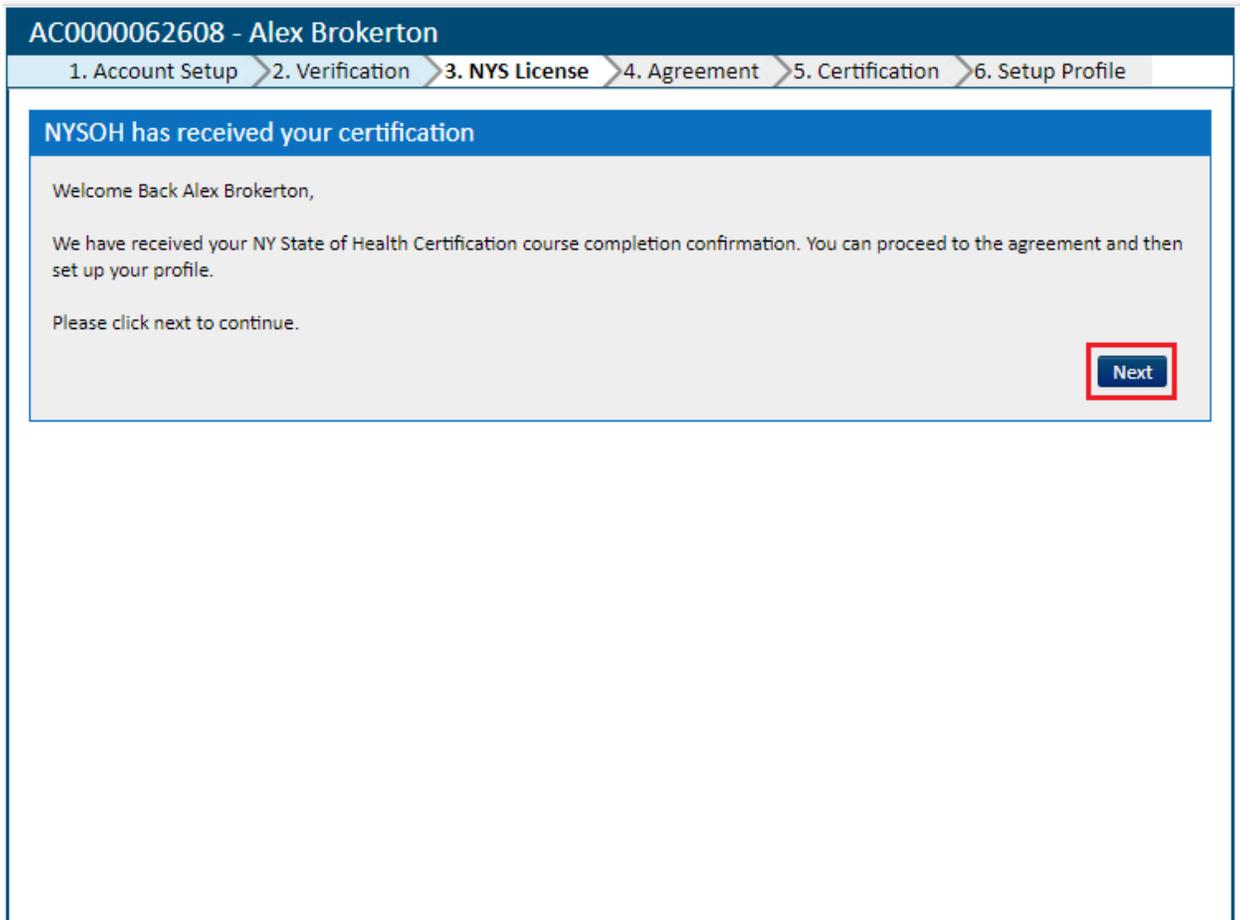
1. Once the Certification Training courses are completed, log in to <https://nystateofhealth.ny.gov>. Click **Broker** in the upper right-hand corner.



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 includes the NYSOH logo and navigation links: 'ABOUT', 'RESOURCES', 'FORMS', 'GET HELP', a phone number '1-855-355-5777', and 'LANGUAGES'. Below the header are user role links: 'Individuals & Families', 'Employers', 'Employees', 'Brokers', and 'Assistors'. The main content area is titled 'Brokers' and contains a description of the portal's services, a list of services (Setup and enroll new individual clients, View and manage open enrollment activity for individual clients, Process individual client renewals, Setup new employer groups and perform maintenance for SHOP eligibility determinations), and a note about client communication. On the right, there is a 'Get Started' section with two options: 'Returning Users' with a red box around the 'CLICK HERE TO LOGIN' link and 'With your NYS GOV ID.', and 'New Users' with a 'CLICK HERE TO REGISTER' link and 'Create a NYS GOV ID.'. At the bottom, there is a button that says 'click here to access Broker Tool Kit' and a green box with the text 'Interested in becoming a broker certified to sell on the NY State of Health Marketplace?' followed by a paragraph explaining the certification process and providing contact information for the Marketplace.

3. After logging in, generate the Token to proceed to the Account. A Welcome Back screen appears to continue creating the Broker Profile. Click **Next**.



- Please note the newly generated Account Number along with the Broker Name in the blue bar along the top of the screen.

4. The next step is the *Broker Agreement*. The agreement applies to both the Small Business and Individual Marketplaces.
- Click the **Download** or **Print** buttons in the upper right-hand corner to download/print.
 - **Check the box** at the bottom of the Agreement that you have read and agree to the Privacy and Security Requirements.
 - Click **Next**.

AC0000062608 - Alex Brokerton

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

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.

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INDIVIDUAL AND SMALL BUSINESS MARKETPLACE AGENT / BROKER AGREEMENT

Background

NY State of Health, The Official Health Plan Marketplace ("NY State of Health" or "Marketplace") allows small businesses, individuals and families to compare health insurance options and enroll in coverage. It assists qualified small employers by facilitating the enrollment of eligible employees into qualified health plans ("QHPs") through the Small Business Marketplace. It assists individuals and families by determining eligibility for QHPs and for premium tax credits, cost-sharing reductions, Medicaid, Child Health Plus and the Essential Plan ("Insurance Affordability Programs"); and enrolling individuals into the health coverage for which they are eligible through the Individual Marketplace.

To maximize access to health insurance coverage, the NY State of Health desires to certify certain licensed brokers and agents ("Producers") to:

- (1) assist eligible employers in purchasing QHPs through the Small Business Marketplace; and
- (2) assist individuals and families in applying for coverage through the Individual Marketplace;

I have read and agreed to the Privacy and Security Requirements

5. Next is the *Congratulations* screen. This screen provides the NYSOH Broker Certification Number. It will begin with SX if only certified for the Small Business Marketplace or SI if certified in both the Small Business and Individual Marketplaces. It also includes the Certification Expiration date (this is when you will recertify).
- Click the **View/Print Certification** button to view or print this certification. This can also be done at any time from the Broker's dashboard.
 - Click **Continue** to proceed.

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

Certification

Congratulations!

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

Name: ALEX BROKERTON

Certification Number: SI00303

Certification Expiration Date: 2022-08-05

Certified By:



View / Print Certification **Continue**

6. Next, we set up the user profile. The first step is to add a secondary contact. This should be someone who can speak on your behalf. Complete all fields if you have a secondary to add, then click **Next**. Otherwise, if there is no secondary contact, click **Skip**.

The screenshot shows a web form titled "Additional Contact Information" for user "AC0000062608 - Alex Brokerton". The form is part of a multi-step process: 1. Account Setup, 2. Verification, 3. NYS License, 4. Agreement, 5. Certification, and 6. Setup Profile. The form includes fields for First Name (*), Middle Name, Last Name (*), Suffix, Email Address (*), Email Address Confirmation (*), Date of Birth (*), and Social Security Number (*). The telephone number section is partially filled with (518) 555 - 1213 and Type Cell. A red box highlights the "Skip »" and "Next »" buttons at the bottom right.

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

Additional Contact Information

You can specify a secondary contact who can do business on your behalf.

First Name * Middle Name Last Name * Suffix

Robert [] Robbins --Select v

Email Address * Email Address Confirmation *

example.123456@outlook.com example.123456@outlook.com

Date of Birth * Social Security Number *

06/25/1978 [] [] [] [] [] 1234

Telephone Numbers

Primary Phone Number *

(518) 555 - 1213 X Ext [] Type Cell v

If cell phone standard text messaging rates apply.

+ Add Another Number

Skip » Next »

7. Next, is the Create Profile screen which is the final step of the Identity Proofing/Account Setup process.
- In the top section, under Account Preferences, review the two checkboxes: "Hide Profile from Public Search" and "Send me Client Renewal Reminder Notice". Checking "Hide Profile from Public Search" will eliminate you from the public search tool as a Broker in your area. This must be manually checked if you do not wish to appear in the public search results on the NYSOH. The next checkbox, "Send me Client Renewal Reminder Notice", is automatically checked and will allow the system to send Renewal Reminders on all clients listed in your broker portal on the NYSOH. Then select all Group Sizes you wish to work with.

- Select the Counties Served by selecting the appropriate Counties in which you do business from the corresponding list. Repeat in the Languages Supported and the My Issuer Affiliations sections.
- Under the Agency Affiliations section, enter the Agency's License Number and the affiliated Name and EIN will automatically populate. More than one agency may be added.
 - If you do not work with an agency, check the box that you "Can work Independently on the Marketplace" which will allow you to enroll clients directly without an agency affiliation.
- Click **Submit** once complete.

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

Create Profile

State Unique ID: 234567 License: 23456780 Certification: S100303 Expiration: 2022-08-05 Status: Approved

Account Preferences

Hide Profile from Public Search

Send me Client Renewal Reminder Notice

Group Size

Individual 2 - 10 11 - 25 25+

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
WAYNE WESTCHESTER WYOMING YATES	ALBANY COLUMBIA DUTCHESS MONTGOMERY	French Creole Italian Korean Russian	English Spanish

Available Issuer List

BlueCross BlueShield of Western New York
Independent Health
MetroPlus Health Plan
Today's Options of New York

My Issuer Affiliations

BlueShield of Northeastern New York
CDPHP
CDPHP UBI
EmblemHealth

Agency Affiliation:

Enter Agency's License Number to add to your list.

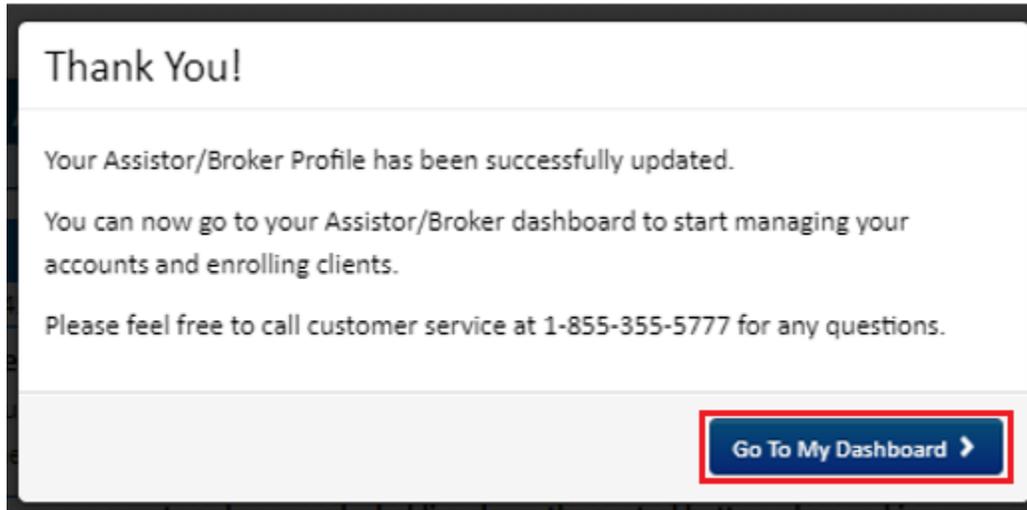
Agency Name Agency EIN (Tax ID) Add

Can work Independently on the Marketplace

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

8. CONGRATULATIONS! Your Broker account and profile have been completed. A message appears that you can now proceed to your dashboard and start enrolling clients. For questions, contact our Customer Support at 1-855-355-5777 or contact the Broker BML mailbox at NYSOHbrokersupport@health.ny.gov.



*Continue to the next user guide: “How to Navigate the Broker Portal” to learn about the functions within the Broker dashboard.