

**There is no sound through your computer.
You must dial-in on the telephone in order to
hear the sound.**



What's Coming:

- **Limiting The Reasonable Opportunity Period for Citizenship, Immigration and Incarceration**
- **Inactive Accounts**
- **Administrative Guidance for Assistors**

**Date: June 27th
Time: 10:00am – 11:30am
Dial-In Number: 1-855-897-5763
Conference ID: 1481719**

TODAY'S WEBINAR



- Two live webinars are running simultaneously.
 - For those of you listening on the telephone and following along using the slides which we sent out, who were unable to get into the webinar due to the capacity limitation, please refer to the email which was sent out this morning and follow the instructions in the email to access the second webinar.
- Dial in to listen to the audio portion of the webinar using the audio instructions on your WebEx control panel.
- All participants will remain muted for the duration of the program.
- Questions can be submitted using the Q&A function on your WebEx control panel; we will pause periodically to take questions.
- A recording of the webinar and any related materials will be available online at our Spring Training webpage at:
<https://info.nystateofhealth.ny.gov/SpringTraining>

What's New (HARP Enrollment, Deductions & DMV ID Proofing)



Here's what you said:

- More than 95% said that the webinar increased your knowledge of the various subject areas.
- More than 97% said that the webinar would allow you to better assist your consumers.

“Trainings are always very informative.”

“The Q&A is helpful.”

PRESENTERS



Welcome

Gabrielle Armenia

Bureau Director, Child Health Plus Policy & Exchange
Consumer Assistance

Speakers

Sara Oberst

Eligibility Program Manager 2, Division of Eligibility and
Marketplace Integration

Marlene Grimshaw

Health Program Administrator 1, Division of Eligibility and
Marketplace Integration

Karilyn Tremblay

Health Program Administrator 2, Division of Eligibility and
Marketplace Integration

Erin Chaskey

Health Program Administrator 2, Division of Eligibility and
Marketplace Integration

Alicia Kern

Medical Assistance Specialist 2, Division of Eligibility and
Marketplace Integration

Nick Johnston

Senior Healthcare Program Specialist, Division of Eligibility and
Marketplace Integration

NY State of Health is Limiting the Reasonable Opportunity Period for consumers to prove:

- Citizenship
- Immigration Status
- Incarceration Status (proof the individual is not incarcerated)

Limiting the Reasonable Opportunity Period



How is this working now?

1. A consumer applies and is found temporarily eligible for a program, they are given 90 days to submit documentation to prove their citizenship, immigration, or incarceration status (proof the consumer is not incarcerated).

Carlton Winslow **Medicaid** Marketplace ID: HX0000055543

Congratulations! You are temporarily eligible to enroll. In order for your application to be approved, you must submit documents to confirm the information you provided is accurate. If you do not submit documentation within the required time frame, the Marketplace will determine your eligibility based on our available records.

Annual Household Income	Federal Poverty Level
\$0.00	0.0%

NY State of Health needs more information to confirm what you told us in your application. You must provide this information by the date listed below to continue your eligibility.

Proof of Immigration

Due Date:	06/27/2018
Select a document type:	--Select--

Upload the Supporting document: No file chosen

2. If, after 90 days, the consumer has not provided valid documentation, NY State of Health finds the consumer to be ineligible to purchase health coverage through the Marketplace.

Erin Chase **Not Eligible to Purchase Health Coverage** Marketplace ID: HX0000062715

You are not eligible to purchase health care coverage through the Marketplace. If your circumstances change, you may contact the Marketplace to have your eligibility re-determined.

3. If, the consumer reapplies and still owes proof of citizenship, immigration, or incarceration status they will receive another 90 day reasonable opportunity period.

Carlton Winslow **Medicaid** Marketplace ID: HX0000055543

Congratulations! You are temporarily eligible to enroll. In order for your application to be approved, you must submit documents to confirm the information you provided is accurate. If you do not submit documentation within the required time frame, the Marketplace will determine your eligibility based on our available records.

Annual Household Income	Federal Poverty Level
\$0.00	0.0%

NY State of Health needs more information to confirm what you told us in your application. You must provide this information by the date listed below to continue your eligibility.

Proof of Immigration

Due Date:	06/27/2018
Select a document type:	--Select--

Upload the Supporting document: No file chosen

How will this work after July 06, 2018?

1. A consumer applies and is found temporarily eligible for a program, they are given 90 days to submit documentation to prove their citizenship, immigration, or incarceration status (proof the consumer is not incarcerated).

Carlton Winslow **Medicaid** Marketplace ID: HX000055543

Congratulations! You are temporarily eligible to enroll. In order for your application to be approved, you must submit documents to confirm the information you provided is accurate. If you do not submit documentation within the required time frame, the Marketplace will determine your eligibility based on our available records.

Annual Household Income	Federal Poverty Level
\$0.00	0.0%

NY State of Health needs more information to confirm what you told us in your application. You must provide this information by the date listed below to continue your eligibility.

Proof of Immigration

Due Date:	06/27/2018
Select a document type:	--Select--
Upload the Supporting document:	<input type="button" value="Choose File"/> No file chosen <input type="button" value="Upload"/>

2. If, after 90 days, the consumer has not provided valid documentation, NY State of Health finds the consumer ineligible to purchase health coverage through the Marketplace.

Erin Chase **Not Eligible to Purchase Health Coverage** Marketplace ID: HX000062715

You are not eligible to purchase health care coverage through the Marketplace. If your circumstances change, you may contact the Marketplace to have your eligibility re-determined.

3. If the consumer reapplies and still owes proof of citizenship, immigration, or incarceration status (proof the consumer is not incarcerated), and they appear eligible for Medicaid, Child Health Plus or Essential Plan, they will be pended for 15 days and asked to submit the documents from the original request (step 1).

What you told us about your immigration status does not match our records. You were previously given eligibility for a limited time to verify this information. You did not provide the documentation by the due date provided. NY State of Health cannot determine your eligibility until this information is verified.

Please Note: If you miss the due date listed below, NY State of Health will **NOT** be able to determine your eligibility for health insurance coverage.

- No coverage will be provided until valid documents are received.

4. If, after 15 days, the needed documentation has not been received, the consumer will be found ineligible to purchase health coverage through the Marketplace.

Madison Jameson **Not Eligible For Financial Assistance** Marketplace ID: HX0002153122

You are not eligible to receive help paying for your health insurance coverage. However you can purchase a qualified health plan through the Marketplace at full cost. If your circumstances change, you may contact the Marketplace to have your eligibility re-determined.

How will this work after July 06, 2018?



Peter Parker
1234 Address Rd
Brooklyn, NY 12345

December 31, 2017
Account ID: AC0000000001

ACTION REQUIRED TO CONFIRM YOUR ELIGIBILITY

We have reviewed your application for health insurance through NY State of Health dated December 30, 2017. The information you provided does not match our records. More information is needed to determine eligibility for members of your household.

Please Note: If you miss the due date, NY State of Health will **NOT** be able to determine your eligibility for health insurance coverage.

Peter Parker

Marketplace ID: HX000000123

APPLICATION STATUS: What you told us about your immigration status does not match our records. You were previously given eligibility for a limited time to verify this information. You did not provide the documentation by the due date provided. This information is still not verified. NY State of Health cannot determine your eligibility until this information is verified.

ACTION REQUIRED: Provide proof of **Immigration Status** by **January 10, 2018**.
There can be more than one document to prove your current immigration status. Please send in all relevant documents you have available that proves your current immigration status. (See the documentation checklist at the end of this notice for more specific options.)

Limiting the Reasonable Opportunity Period



Flow Chart: After July 06, 2018

Consumer completes application and receives 90 day reasonable opportunity period to submit documents for citizenship, immigration, or incarceration status.

Consumer receives temporary eligibility for MA, CHPlus, EP, or a QHP with a 90 day clock.

Consumer does not submit any documentation or does not submit sufficient documentation within the 90 day period.

- NY State of Health finds the consumer ineligible for all programs.

Consumer reapplies and NY State of Health will re-run eligibility and try to verify:

- Immigration, citizenship status through Federal Data Sources.
- Incarceration status through incarceration data sources.

Consumer reapplies and appears to be eligible for a QHP.

- Consumer receives eligibility for QHP with a 90 day clock.

Consumer reapplies and appears to remain eligible for MA, CHPlus or EP.

- Consumer's citizenship, immigration, or incarceration status cannot be verified electronically
- Consumer will be pended for 15 days with no eligibility until original verification documents (which are valid) are received.

Consumer submits sufficient documentation within the 15 day period.

- NY State of Health determines the consumer eligible for MA, CHPlus or EP.

Consumer does not submit any documentation or does not submit sufficient documentation within the 15 day period.

- NY State of Health determines the consumer ineligible for all programs.

MA – Medicaid
CHPlus – Child Health Plus
EP – Essential Plan
QHP – Qualified Health Plan
LSC – Life Status Change
SEP – Special Enrollment Period

What about pregnant women who need to verify Citizenship or Immigration status?

If a consumer reports a pregnancy after her 90 day reasonable opportunity has expired and she now appears eligible for Medicaid, NY State of Health will not pend her coverage.

Outstanding documentation for Citizenship or Immigration Status

- If the consumer completes her initial application, reports a pregnancy and needs to verify her citizenship or immigration status. She will receive a 90 day reasonable opportunity period with temporary coverage. However, if she does not satisfy the outstanding verification request, her full Medicaid coverage will continue through her 60 day post partum period.
- If the consumer completes her initial application when she is not pregnant and needs to verify her citizenship or immigration status, she receives a 90 day reasonable opportunity period with temporary coverage. After 90 days, NY State of Health will determine her ineligible for coverage if she does not satisfy the outstanding verification request.
 - If this consumer comes back and updates her account and reports a pregnancy, NY State of Health will open a 15 day clock to verify the citizenship or immigration status, but will also allow her to enroll in Medicaid if otherwise eligible. If she does not satisfy the outstanding verification request, her full Medicaid coverage will continue through her 60 day post partum period.

Wilma Flinstone Medicaid Marketplace ID: HX0000055503

The income information you provided to us does not match our records. We will not be able to make an eligibility determination until you provide additional information. You will be enrolled in Medicaid, but we need documents to prove your income within 15 days.

Annual Household Income	Federal Poverty Level
\$30,000.00	146.91%

How can an Assistor help?

If the Marketplace is requesting documentation to verify **citizenship** status, look at the consumer's account. This consumer is marked as either a US Citizen or a Naturalized Citizen. Review the Documentation checklist for consumers.

Mark one box that indicates Erin's current Citizenship or Immigration Status.*

US Citizen

Naturalized Citizen

Immigrant Non-Citizen

Non-Immigrant Visa Holder

Other

If the consumer truly does not have access to any items on this list, then they are probably marked incorrectly in their application.

Immigration Box Checked	Document which will verify this status
US Citizen	US Passport or Card
US Citizen	Certificate of US Citizenship
US Citizen	NYS Enhanced Driver License
US Citizen	Native American Tribal Document
US Citizen	Birth Certificate plus another document
US Citizen (Citizen or Resident of Puerto Rico)	Puerto Rican Birth Certificate
US Citizen (Citizen or Resident of Puerto Rico)	Proof of Puerto Rican Citizenship
Citizen or Resident of other U.S. Territories	See Document Checklist
Native American	See Document Checklist

Immigration Box Checked	Document which will verify this status
Naturalized Citizen	US Passport or Card
Naturalized Citizen	Certificate of Naturalization
Naturalized Citizen	Certificate of U.S. Citizenship
Naturalized Citizen	NYS Enhanced Driver License

Example: If they are providing their permanent resident card, then you should change their Citizenship/Immigration status to "Immigrant Non-Citizen."

How can an Assistor help?

If the Marketplace is requesting documentation to verify **immigration** status, look at the consumer's account. This consumer is marked as either an Immigrant-Non Citizen or a Non-Immigrant Visa Holder. Review the Documentation checklist with the consumer.

Mark one box that indicates Erin's current Citizenship or Immigration Status.*

- US Citizen
- Naturalized Citizen
- Immigrant Non-Citizen
- Non-Immigrant Visa Holder
- Other

If the consumer truly does not have access to any items on this list, then they are probably marked incorrectly in their application.

Example: If they are providing their foreign passport with an expired I-94 Arrival/Departure Record and they are undocumented, then you should change their Citizenship/Immigration status to "Other."

Immigration Box Checked	Document which will verify this status
Immigrant Non-Citizen or Non-Immigrant Visa Holder	See Document Checklist
If they do not have one of these documents	See Document Checklist
Battered Immigrant Non-Citizen	See Document Checklist
New York State Residency (For certain non-immigrant visa holders)	See Document Checklist
Immigrant Non-Citizen (selects they are a veteran or active military)	See Document Checklist

How can an Assistor help?

If the Marketplace is requesting documentation to verify **the consumer is not incarcerated**, review the documentation checklist with the consumer.

Help your consumer by uploading one of these items.

DOH-5183 will be provided as a resource with this webinar.

Not Incarcerated

- Release Paperwork.
- A signed statement from a probation or parole officer.
- A copy of the formerly incarcerated person's photo ID and a current paystub; or
- A copy of the formerly incarcerated person's photo ID and a signed statement from an employer, Navigator/CAC/Assistor or community-based organization, such as a hospital or a re-entry organization.
- DOH-5183- Proof Individual No Longer Incarcerated and applicable proof of identification submitted per DOH-5183.

How can an Assistor help?

If you need assistance with a particular case and are unsure how to advise the consumer in order to satisfy a documentation request please contact:

Assistor.cases@health.ny.gov

Poll Question #1



Mr. Neymar applies for health insurance and is found temporarily eligible for Medicaid. He is given 90 days to provide proof of immigration status. Mr. Neymar did not submit his documentation by the deadline and reapplies without updating his immigration status. What happens next?

- A. He is given another 90 days to submit documentation
- B. He is pended and gets 15 days to submit documentation
- C. He is found temporarily eligible and receives 15 days to submit documentation
- D. He is found ineligible for coverage

Questions?



Inactive Account Changes

NY State of Health is making some changes to system functionality in order to reduce the number of duplicate accounts for a consumer in the individual Marketplace.

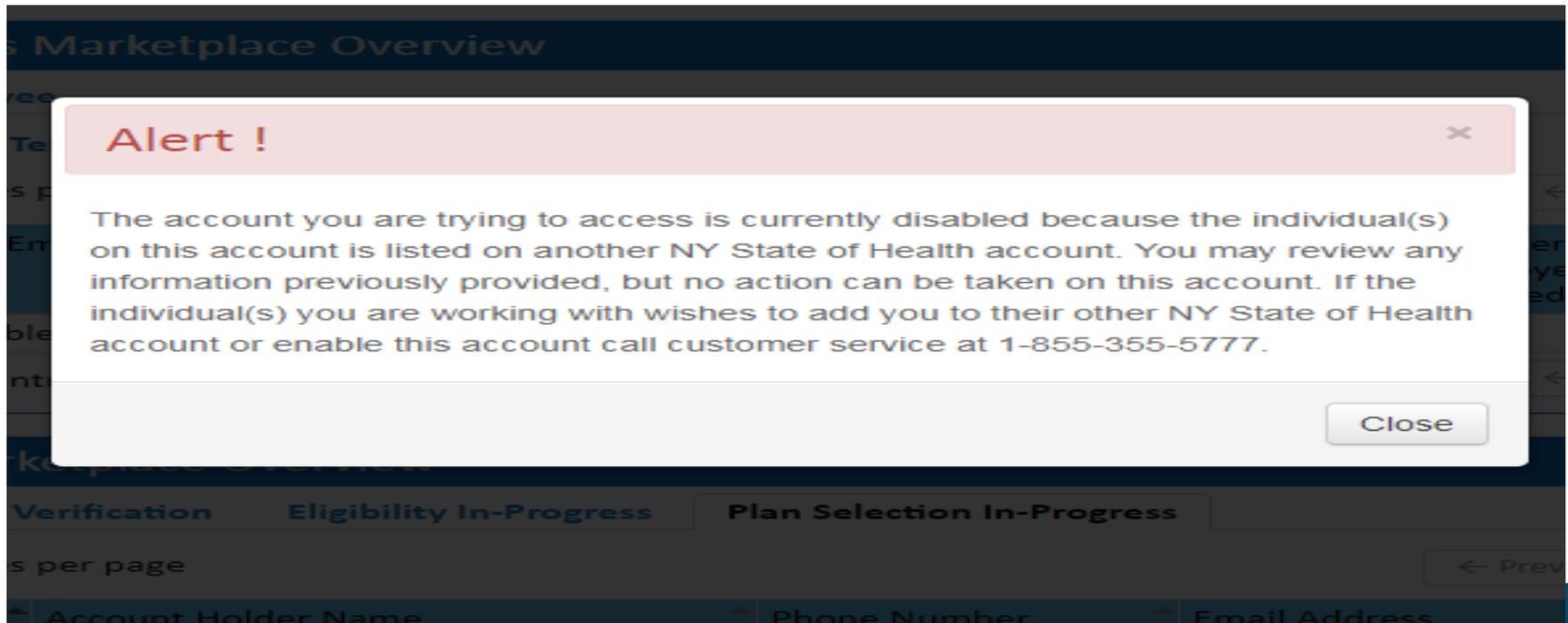
New functionality will enhance the process of inactivating individual duplicate accounts and restrict the ability of the user to make changes to an inactive account.

When the decision has been made to inactivate an account, eligibility and coverage will end at the end of the current month in which the account is inactivated.

- Consumers will stop receiving notices related to the inactive account.
- No further changes to the inactive account will be able to be made by the consumer or Assistor.
- Messaging will be added to the overview page of a consumer's inactive account letting the consumer know that the account cannot be changed

The account you are trying to access is currently disabled because you are listed on another NY State of Health account. Don't worry! All of your information is safe and you can still view the information you've provided on this account. Please log into your other NY State of Health account (AC0000028097, AC0000028100) if you need to report any changes or want to review your health insurance information. If you need help accessing your other NY State of Health account or wish to enable this account call customer service at 1-855-355-5777.

A warning message will be displayed when trying to access an inactive account. through the Assistor dashboard.



The screenshot shows a web application interface with a dark blue header and a light blue sidebar. The main content area is white. A modal alert box is displayed in the center, with a pink header and a white body. The alert text reads: "Alert ! The account you are trying to access is currently disabled because the individual(s) on this account is listed on another NY State of Health account. You may review any information previously provided, but no action can be taken on this account. If the individual(s) you are working with wishes to add you to their other NY State of Health account or enable this account call customer service at 1-855-355-5777." A "Close" button is located in the bottom right corner of the alert box. Below the alert box, there are several tabs: "Verification", "Eligibility In-Progress", and "Plan Selection In-Progress". At the bottom, there is a table with columns for "Account Holder Name", "Phone Number", and "Email Address".

Alert !

The account you are trying to access is currently disabled because the individual(s) on this account is listed on another NY State of Health account. You may review any information previously provided, but no action can be taken on this account. If the individual(s) you are working with wishes to add you to their other NY State of Health account or enable this account call customer service at 1-855-355-5777.

Close

What will happen when I help a consumer create a new account, and it turns out they already have an account (or more than one (1) account)?

An account holder is allowed to have two (2) active individual accounts in NY State of Health.

- If a consumer is trying to create a third individual account, it will be automatically inactivated by the system.
 - The account will be inactivated upon completion of the identity proofing process.
 - Once identity proofing is successful, or if the HX ID pop-up is received and the Call Center is able to find an existing HX ID for the consumer, then the consumer/Assistor will be stopped in the application and not allowed to proceed further. They will receive the following message:

You are unable to continue with your application because you already have a NY State of Health account. Please log into the NY State of Health account you already have to report any changes or to review your health insurance information. If you are unsure what other NY State of Health account you have or wish to continue your application on this account call customer service at 1-855-355-5777.

Once the active account has been added to your dashboard, you may delete the inactive account.

Individual's Name [Last] [First]	AccountID SSN Phone Number	Address	Eligibility End Date	Enrollment End Date	Enrollments Status	Renewal Type	Action
Duck, Donald	AC0000052884 ***-**-1170 518-473-0566	815 DeCamp Ave Schenectady NY, 12309	N/A	N/A			<i>manage</i> <i>invite</i> <i>delete</i>



Poll Question #2



Mr. Salah comes in and applies for health insurance but the system invalidates the account. Why did that happen?

- A. The system is unable to identify him
- B. He already has two (2) active accounts
- C. He has access to New York State Health Insurance Program (NYSHIP)
- D. All the above

Questions?



Administrative Guidance for Assistors



Navigators



578

Certified Application
Counselors (CAC) and
Facilitated Enrollers (FE)



6,122

Brokers



2,817

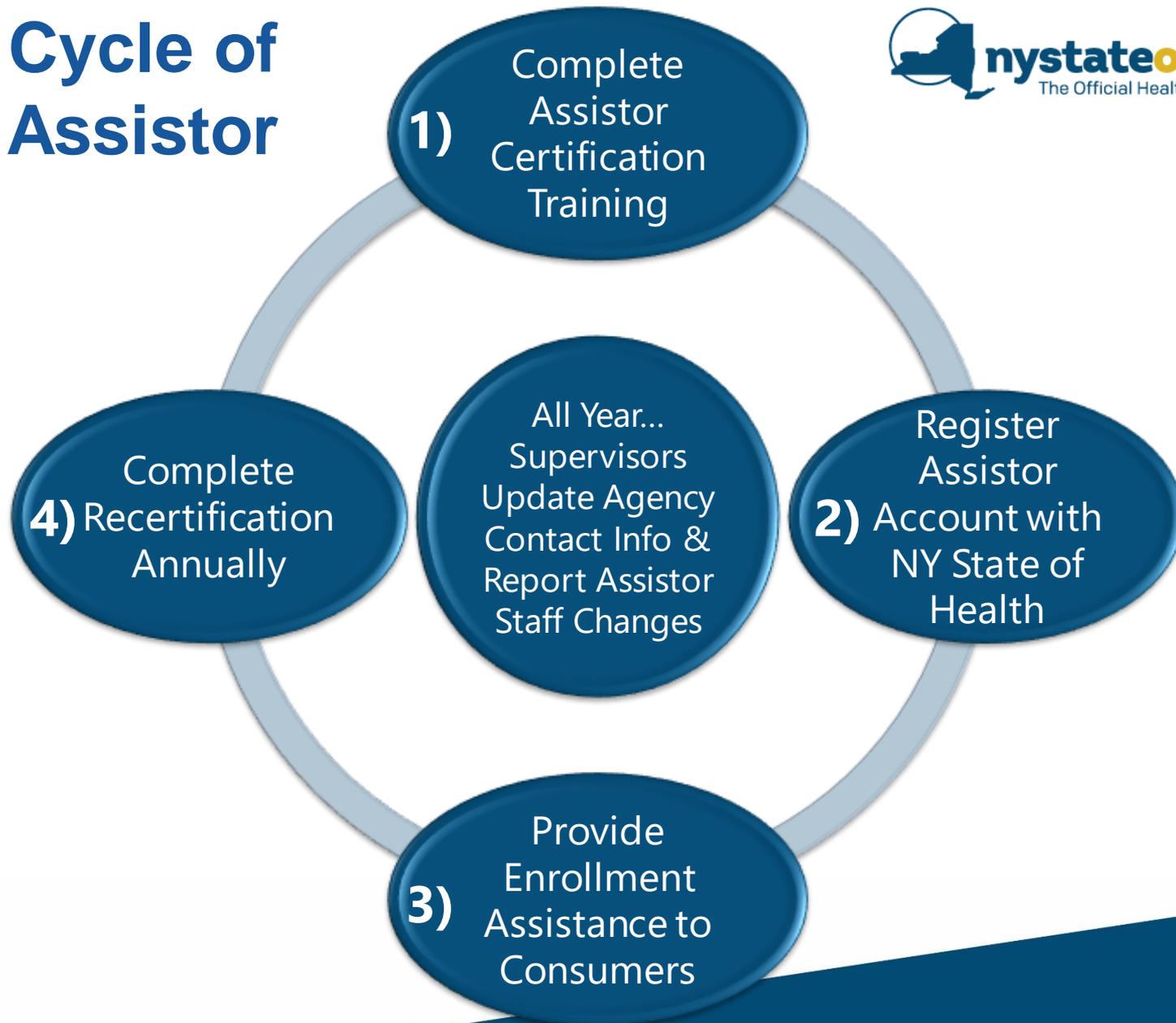
9,517 total certified assistors throughout New York State.

Assistors account for 74% of all enrollment through NY State of Health!



Life Cycle of the Assistor

Life Cycle of The Assistor



Life Cycle of The Assistor

ALL YEAR...

**The Agency Supervisor or
Primary Contact is required to Update
Agency Contact Info & Report
Assistor Staff Changes**

****Note for supervisors****

**Assistor staff changes need to be
reported to DOH within 48 hours
of the announced change**

**DO NOT WAIT UNTIL
RECERTIFICATION**

Effective Assistor Communication with NYS Department Of Health

When You Encounter a Problem

- **As a general rule, the first step is ALWAYS to reach out to your supervisor for help**
- **If your supervisor needs further assistance, THEY should reach out to the NYS Department of Health**

Assistor Support at NYS Department of Health



Mailboxes for all Assistors

- For both Certified Application Counselors (CACs) and Navigators

Assistor.Admin@health.ny.gov = *Administrative Support for Assistors*

- Training Information
- Setting up your account as an assistor
- Reporting staff changes
- Agency Contact Information Updates

NEW Assistor.Cases@health.ny.gov ***NEW*** = *Case Support for Assistors*

- This new Assistor Cases mailbox replaces both the CAC Mailbox and the Navigator Cases mailbox
- Questions about eligibility and enrollment regarding marketplace accounts should be sent to this mailbox

Assistor Support at NYS Department of Health

Mailboxes Specifically for Navigators

Navigator.Admin@health.ny.gov

- Contracts, Vouchers, Progress Reports, and Site Schedules

Navigator.Media@health.ny.gov

- Education, Promotion, Media Requests

****Remember to cc your contract manager****

Sending Emails Securely

- Remember that the NYS Department of Health requires Personally Identifiable Information (PII) and Protected Health Information (PHI) to be sent securely in a compressed and encrypted file using a password or “key”
- The password or “key” to the encrypted file must be sent via a separate e-mail.
 - For example: organizations may use WinZip or 7 Zip encryption software and should label the file: Confidential, As Requested
- A private or "home" e-mail account must not be used for NY State of Health case inquires or issues



Communication with the NY State of Health Call Center

NY State of Health

Call Center Information

Call Center – General Questions

<u>General Customer Service</u>	<u>1-855-355-5777</u>
<u>General Fax</u>	<u>1-855-900-5777</u>

Consumer Identity Proofing

<u>ID Proofing Fax</u>	<u>1-518-560-5102</u>
<u>ID Proofing Telephone Follow Up</u>	<u>1-855-357-8450</u>

1095-A & 1095-B Dedicated Line

<u>Customer Service Line</u>	<u>1-855-766-7860</u>
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When Calling the Call Center

The level of assistance a Customer Service Specialist (CSS) at the call center may provide to an Assistor depends on

- 1) Whether the assistor is authorized to speak on behalf of the consumer
- 2) Whether the consumer is present (either in person or on the phone) with the Assistor at the time of the call

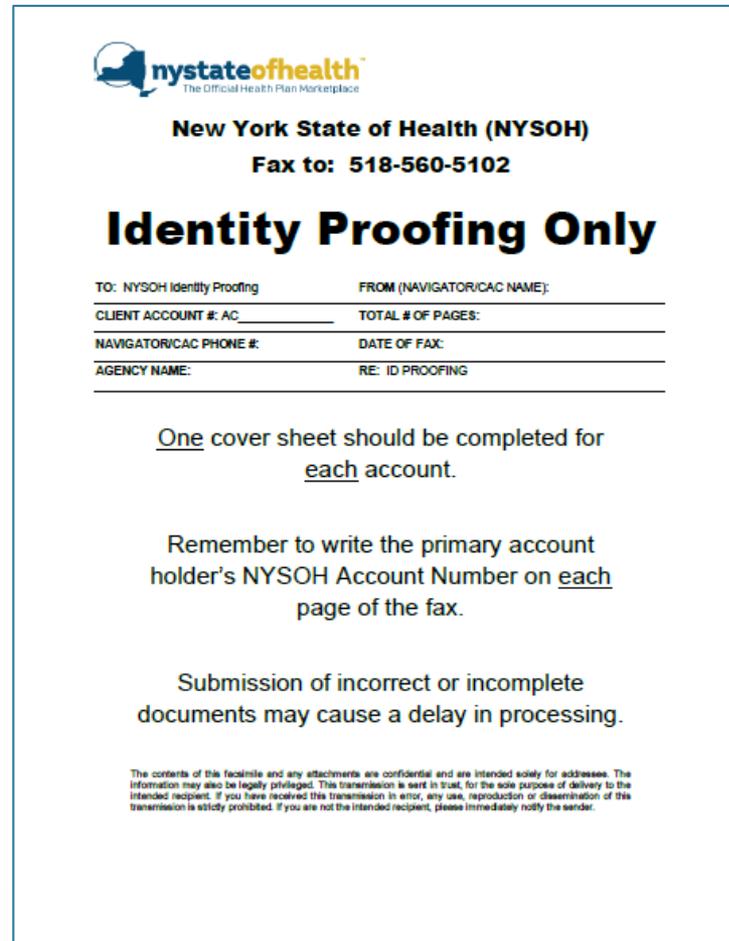


When Sending a FAX to the Call Center

1) Please remember to use the NY State of Health approved fax cover sheet

2) Make sure all fields are filled out, and are

- Legible
- Accurate




The Official Health Plan Marketplace

New York State of Health (NYSOH)
Fax to: 518-560-5102

Identity Proofing Only

TO: NYSOH Identity Proofing	FROM (NAVIGATOR/CAC NAME):
CLIENT ACCOUNT #: AC _____	TOTAL # OF PAGES: _____
NAVIGATOR/CAC PHONE #: _____	DATE OF FAX: _____
AGENCY NAME: _____	RE: ID PROOFING

One cover sheet should be completed for each account.

Remember to write the primary account holder's NYSOH Account Number on each page of the fax.

Submission of incorrect or incomplete documents may cause a delay in processing.

The contents of this facsimile and any attachments are confidential and are intended solely for addressee. The information may also be legally privileged. This transmission is sent in trust, for the sole purpose of delivery to the intended recipient. If you have received this transmission in error, any use, reproduction or dissemination of this transmission is strictly prohibited. If you are not the intended recipient, please immediately notify the sender.

Authenticating the Assistor

- The Call Center is required to gather information about the person they are speaking to and confirm they are authorized to speak on behalf of the consumer. This applies to everyone on the call
- When you call the Call Center, immediately identify yourself as an Assistor
- As an Assistor, be prepared when you call to have your Assistor information ready
- Most importantly, this process helps maintain the privacy and security of the consumer



Authenticating the Assistor

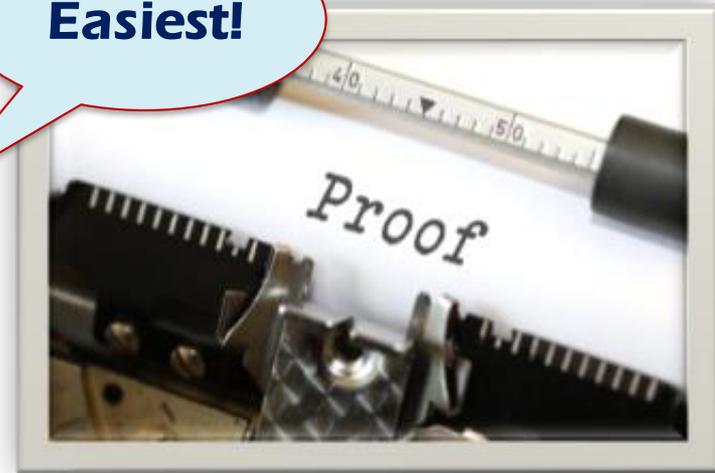
To authenticate you as an Assistor, you will be asked to spell your first and last name, and to give some combination of the following information

1. Assistor Account Number AND Phone number (as listed on your assistor profile), OR

2. Assistor SSN, Assistor DOB, AND phone number, OR

3. Assistor NYHBE Member ID (HX ID), Assistor DOB, AND phone number

Easiest!



Authenticating the Consumer

A caller who is the Marketplace Account Holder must be authenticated by providing and spelling their first and last name and some combination of the following information

1. SSN and DOB OR
2. Account Number (AC#) and DOB OR
3. Active or Inactive Medicaid ID (CIN) and DOB OR
4. Health Exchange (HX) ID and DOB OR
5. Alien ID and DOB



Authenticating vs Authorizing



Authenticating

- The **Call Center** is required to authenticate EVERYONE they are speaking with
 - Verifies you are who you say you are
 - Necessary – Have your assistor information ready

Authorizing

- The **Account Holder** must authorize you to receive their Personal Health Information (PHI) or make changes to the health insurance application or account – before you can access their account
 - NOTE: Only the account holder / case head can authorize an individual to speak on behalf of their account to gain information or make changes

Authorization

- The consumer must authorize the Assistor
- The consumer must be on the phone to transfer the account to the Assistor
- The Assistor may ask general questions about the consumer's account

Please remember

- Check and see if a consumer is already on your dashboard prior to calling the Call Center
- If the Assistor is hidden from the public search screen, the Call Center will be unable to assign the Assistor to the consumer's account

Public Search Preferences

Hide Profile from Public Search

- The assistor cannot request an individual's client identification number (CIN) unless the consumer is present
- Assistors should process new applications and make changes to applications using their dashboard and should not contact the call center to make these updates

Once Authenticated AND Authorized to Access the Account:

- **The Call Center should only provide you with general information about the application and enrollment process**
- **The Call Center should not be asked to make changes to the application**
- **The Call Center will complete documentation review and complaint processing using their standard protocols**
- **If the Assistor is experiencing a technical difficulty, the Call Center may be able to resolve a specific technical problem**
- **A consumer must always authorize any changes to their account**

Pre-Appointment Preparation

Pre-Appointment Preparation

Set Expectations

- Describe the application and enrollment process before the appointment
- Give them a brief overview of the process
 - How long an appointment may take
 - Possible outcomes of appointment
 - Only the Marketplace can determine eligibility
- Tell the consumer what information they will need to bring in order to enroll – Use ‘Document Checklist’ as a guide



Pre-Appointment Preparation

What a consumer should bring to an appointment

- **Provide facts about people in their household**
 - Demographic details such as; names, date of birth, social security numbers, income for all household members, immigration document numbers, information regarding any other health insurance that they have or have access to
- **Consumers may have to provide copies of documents that prove the information that they have entered in the application**



Pre-Appointment Preparation

- **It is a good idea to have the consumer authorize you as their assistor prior to their appointment**
 - If they have an NY.GOV ID and access to their own Marketplace account, they can do this on their own
 - If they need to call the Marketplace to have the call center assist with this process, they will need the assistor's first and last name and the Assistor Agency Name
 - The consumer should remain on the phone until the assistor has been added



Tips to Reduce No Shows

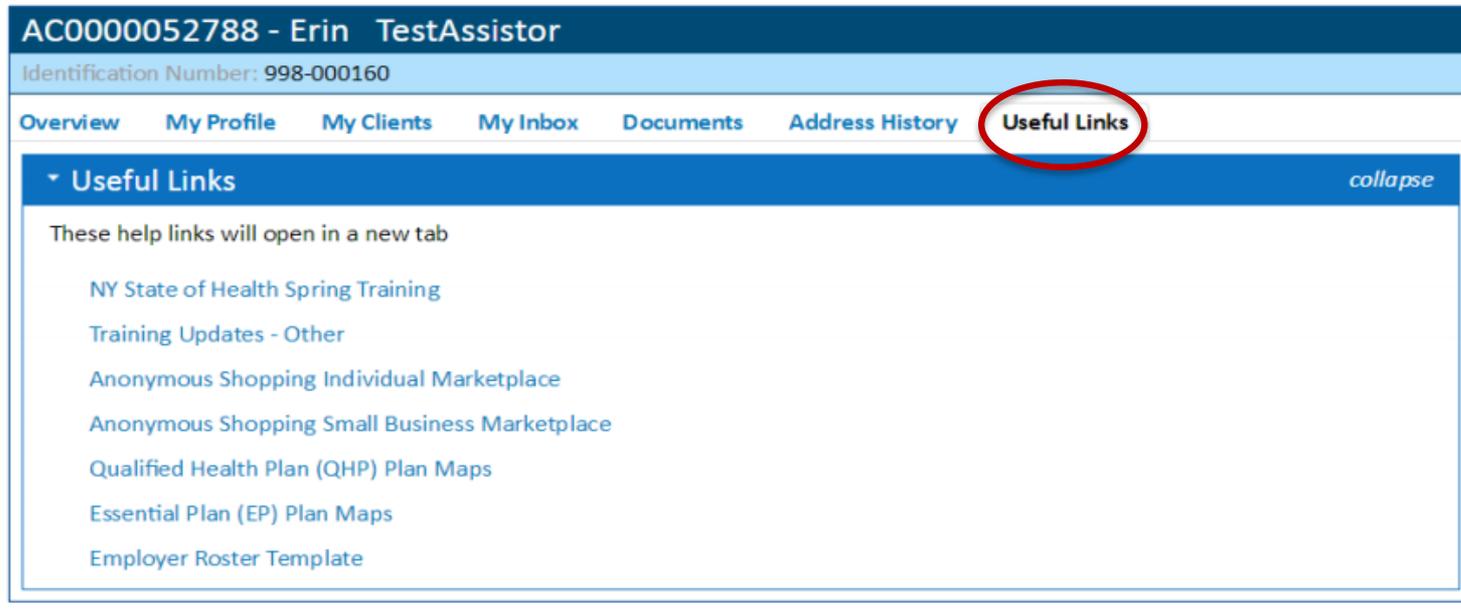
- Place reminder calls prior to appointment
- Provide consumer with a document checklist to prepare for the appointment
- Reach out to reschedule all missed appointments
- Use a cancellation or waiting list to move up later appointments into earlier slots
- Allow for walk-ins to accommodate clients' busy and unpredictable schedules



Assistor Resources

Assistor Resources

- Refer to your training resources (Initial Certification Training, Recertification Webinars and other resources)
 - In Person – Binder
 - Online – Printable resources
- Useful Links (On your dashboard)



AC0000052788 - Erin TestAssistor

Identification Number: 998-000160

Overview My Profile My Clients My Inbox Documents Address History **Useful Links**

Useful Links *collapse*

These help links will open in a new tab

- [NY State of Health Spring Training](#)
- [Training Updates - Other](#)
- [Anonymous Shopping Individual Marketplace](#)
- [Anonymous Shopping Small Business Marketplace](#)
- [Qualified Health Plan \(QHP\) Plan Maps](#)
- [Essential Plan \(EP\) Plan Maps](#)
- [Employer Roster Template](#)

Assistor Resources

- **Spring Training**
 - <https://info.nystateofhealth.ny.gov/springtraining>
- **Training Updates – Other Webinars**
 - <https://info.nystateofhealth.ny.gov/webinars>
- **Assistor Online Tool Kit**
 - <https://info.nystateofhealth.ny.gov/assistor toolkit>
- **Additional updates may be sent to you from the NYS Department of Health throughout the year**

Assistor Agency Reports

Assistor Enrollment Reports

- **Provides enrollment activity associated with your agency's assistors including**
 - Number of individuals determined eligible
 - Number of individuals enrolled in coverage
 - Number of applications currently on your assistors' dashboards
 - Program enrollment percentages
 - Number of individuals assisted



Assistor Complaint Reports

- **The NYS Department of Health receives reports of incidents from NY State of Health regarding assistor customer service issues**
- **These reports are researched by Department of Health staff**
 - Some incidents are categorized as a “Training Opportunity”
 - Other complaints are more serious and require a response from the assistor agency. If your agency has complaints that require follow up, this will be noted in the Assistor Complaint Reports



Assistor Upload Error Reports

- **The Error Report includes instances in which an assistor uploads a document to an account in which it does not belong**
- **To minimize these errors**
 - Take your time when uploading documents to NY State of Health
 - Reminder, assistors should not have copies of consumer documents if the consumer is no longer present
- **Please refer to the Document Linking Checklist**



Document Linking Checklist

For example, before uploading a copy of a paystub for Christine Jones to Ms. Jones' account, the Assistor must validate that the:

- first and last name; *and*
- address; *and*
- last four digits of SSN; *and*
- date of birth

on the paystub match the information on the account.

If one consumer has provided three separate documents, a Checklist must be completed for EACH document prior to upload.

Do not upload the Checklist. Only the document is uploaded.

Document Linking Checklist			
Answer the following questions before linking each document to a consumer's account.			
	Yes	No	N/A
Does the name on the document, match the name of a consumer listed in the account you are linking to?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If there is an address listed on the document, does it match the address of the consumer account you are linking to?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If there is a SSN on the document, do the last four digits match the last four digits of the SSN of a consumer listed in the account you are linking to?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If there is a DOB on the document, does it match the DOB of a consumer listed in the account you are linking to?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
After reviewing the questions above, have you confirmed you are linking this document to the correct account?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Be sure to delete the document after it has been uploaded.

Incident Reporting

- If an assistor suspects there has been a loss OR potential loss of PII or PHI – they **MUST** report it immediately to a supervisor
- Assistor organizations must report the incident to the marketplace, **AND via email to**
NYSOHSecurity@health.ny.gov

Quality Assurance

The NYS Department of Health continually reviews Assistor specific errors to identify patterns of repeated mistakes, so that agencies can take corrective measures





Sharing your Success

- **Be Positive about NY State of Health**
 - Whether you are at a one on one appointment, at an event, or on the phone with the call center, Assistors are the face of the Marketplace, remember to be positive!



Sharing your Success

- **Be Professional**
 - Assistors should always be wearing some form of identification when they are on the job (in the office, out in the field, or at an enrollment or outreach event)
 - Either their employee badge, or if you are a Navigator, your NY State of Health ID badge



Sharing Your Success

- **Be Proactive**

Whether it's being more strategic about how you schedule appointments, or how you handle your cases – be proactive about how you use the resources we have shared with you and give us feedback about the experiences you have with them, and how we can make them better! You can email your feedback to Assistor.Admin@health.ny.gov or reach out to your contract manager



Sharing Your Success

- **Share your Success Stories**
 - Send your success story NYSOHO outreach@health.ny.gov and Navigator.Media@health.ny.gov with subject line “Success Story”
- **Participate in Outreach Events – Get the word out!**
 - We send outreach event announcements throughout the year
 - You may also submit your own events to be featured on NY State of Health’s events map
 - www.surveymonkey.com/s/NYSOHCalendarEvents

In Conclusion

- **Keep up the great work!**



Questions?



RECERTIFICATION PROCESS



- All Assistors who are registered by **10/31/2018** and/or who were **trained in September or October of 2018** must view all webinars to be recertified.
 - <https://info.nystateofhealth.ny.gov/SpringTraining>
- Assistors, keep track of the date you watched the live webinar or the video for each of this year's five (5) Recertification Webinars.
- Provide your dates to your supervisor so they can complete the Recertification Report.

Thank you for joining us!



- Please complete the survey
 - Evaluation of Webinar: What's Coming
- As always, watch for the video and materials to be posted to:
<http://info.nystateofhealth.ny.gov/SpringTraining>

Next Recertification Training:

Title: Privacy & Security

Date: August 29th