How to Create a Broker Account

1. Once you have created your NY.gov ID and set your password (see the guide, "How to Create a NY.gov ID"), return to the Broker tab from the NYSOH home page and select *CLICK HERE TO LOGIN*.

New York State | State Agencies | Search NY.GOV site

nystateofhealth The Official Health Plan Marketplace

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Individuals & Families | Employers | Employees | Brokers | Navigators

Brokers

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: Group setup and enrollment for new clients, view and manage open enrollment activity, upload and edit employee rosters; process client renewals and manage client activity.

NY State of Health will share all client communication as well as provide you with updates and information on the marketplace via your private email account and inbox located on the portal.

Get Started

Returning Users
CLICK HERE TO LOGIN ▸
With your NYS GOV ID.

New Users
CLICK HERE TO REGISTER ▸
Create a NYS GOV ID.

Interested in becoming a broker certified to sell on the Health Plan Marketplace?

Brokers must be trained and certified for the Small Business Marketplace. Brokers can also elect to complete additional training requirements to become certified in the Individual marketplace. You can select the training option that works best for you in the classroom, online or webinar. To learn how you can become a NY State of Health certified broker, contact the Department of Financial Services (DFS) at this web address, http://www.dfs.ny.gov/insurance/agbrok/ab_shop.htm This web site will help you locate an approved training vendor, view class schedules and locations.

1 Sign up for training.

Click here to find an approved DFS training provider and contact them directly to register for Small Business Marketplace Broker Certification training course.

2 Complete certification training.

The Small Business Training Course is a pre-requisite for the Individual Marketplace course. Brokers will receive eight (8) continuing education credits.

3 Register

Upon verification by DFS your information will be sent to the NY State of Health. The Small Business Marketplace will email you an invitation with a link and password.

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Overview

NY State of Health makes it easy for you to help small business owners choose health plans that are right for them.

Employee Choice employers can allow their employees to select a plan that meets personal and financial needs, there is no minimum employee participation requirements.

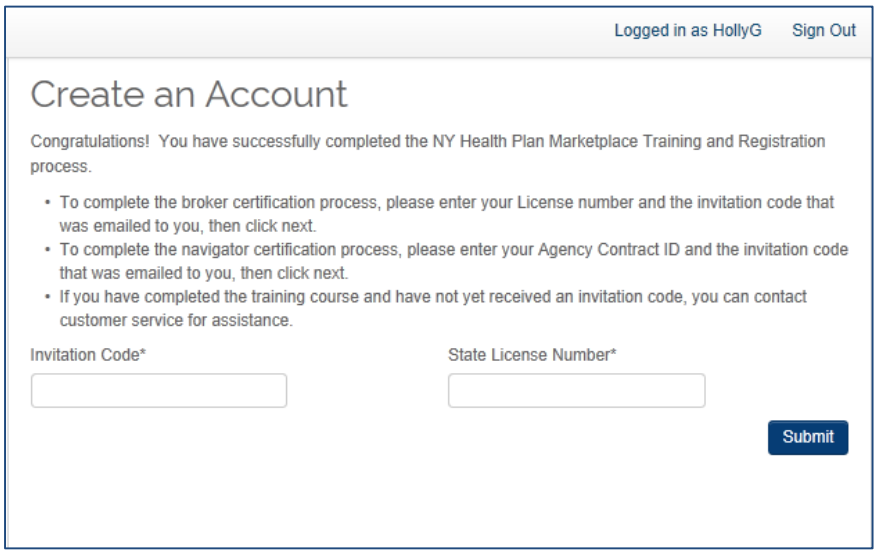
Ease of Administration - Online enrollment available, streamlined applications and business requirements for all carriers.

Tax Credits The Small Business Marketplace is the only place your clients can get access to the federal tax credit.

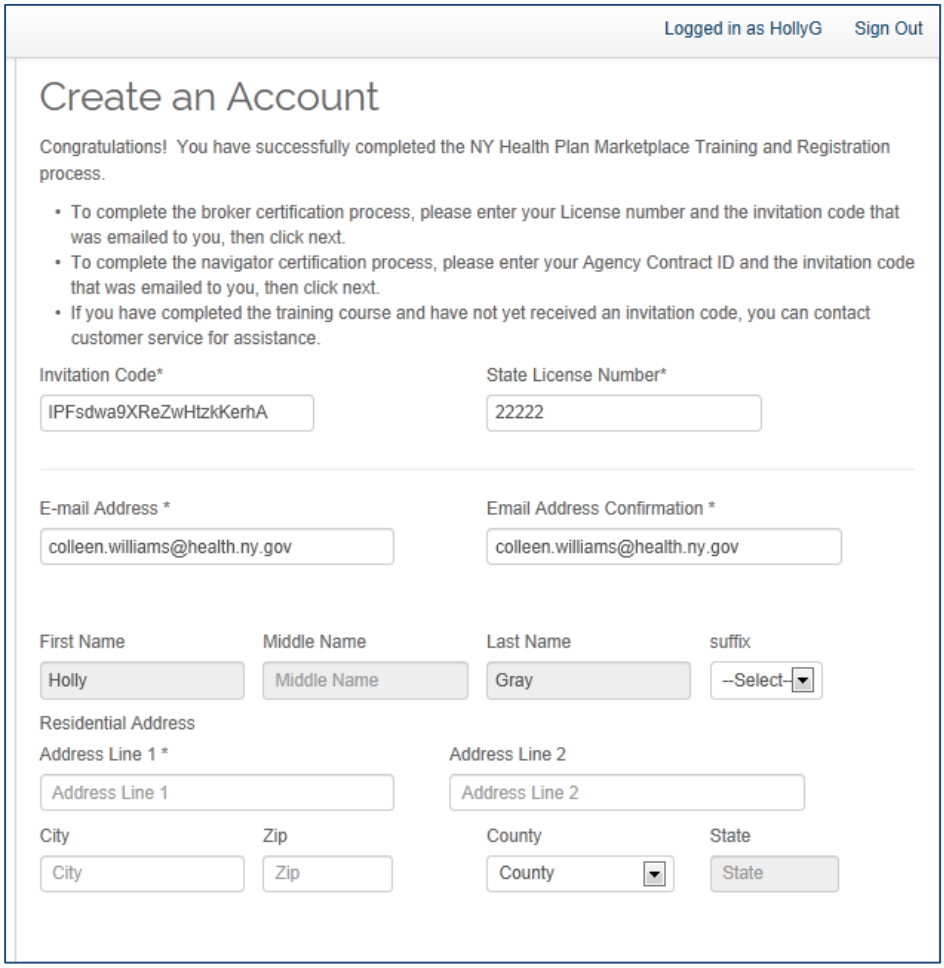
Employer Contribution - There is no minimum employer contribution requirement to participate in the Small Business Marketplace so employers have total flexibility to design a contribution strategy that meets their business needs.

If you have questions or need technical support, you can contact our full service broker support center at 1-855-355-5777. Customer Service Specialists can answer questions in more than 13 languages and are available evenings and Saturdays. Web Chat and co-browsing options are also available if you need navigation or technical support when utilizing the enrollment portal.

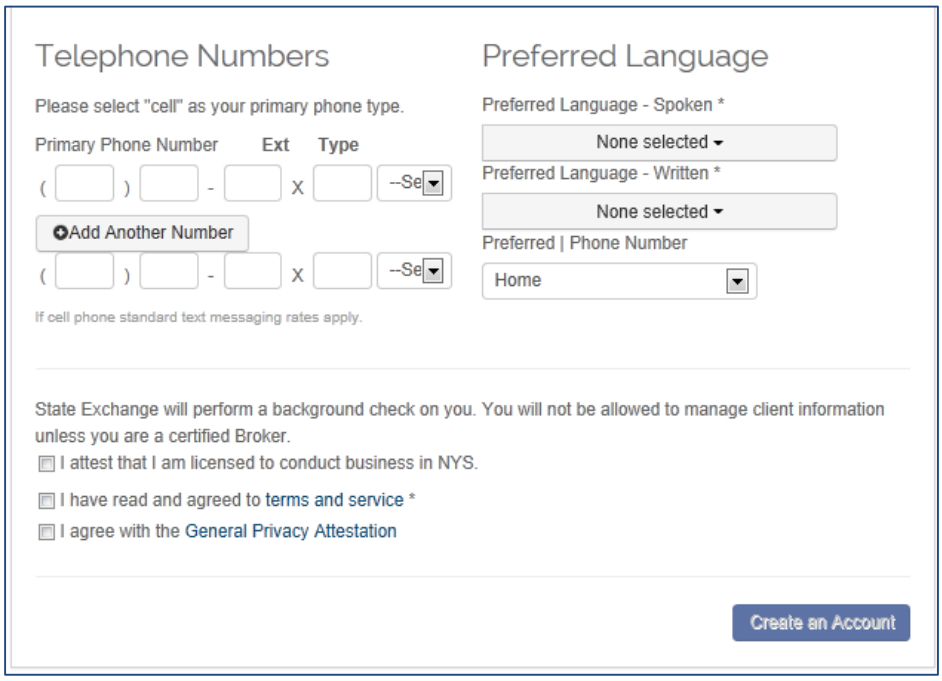
2. On the Create an Account page, enter your Invitation Code and your License Number and click *Submit*.



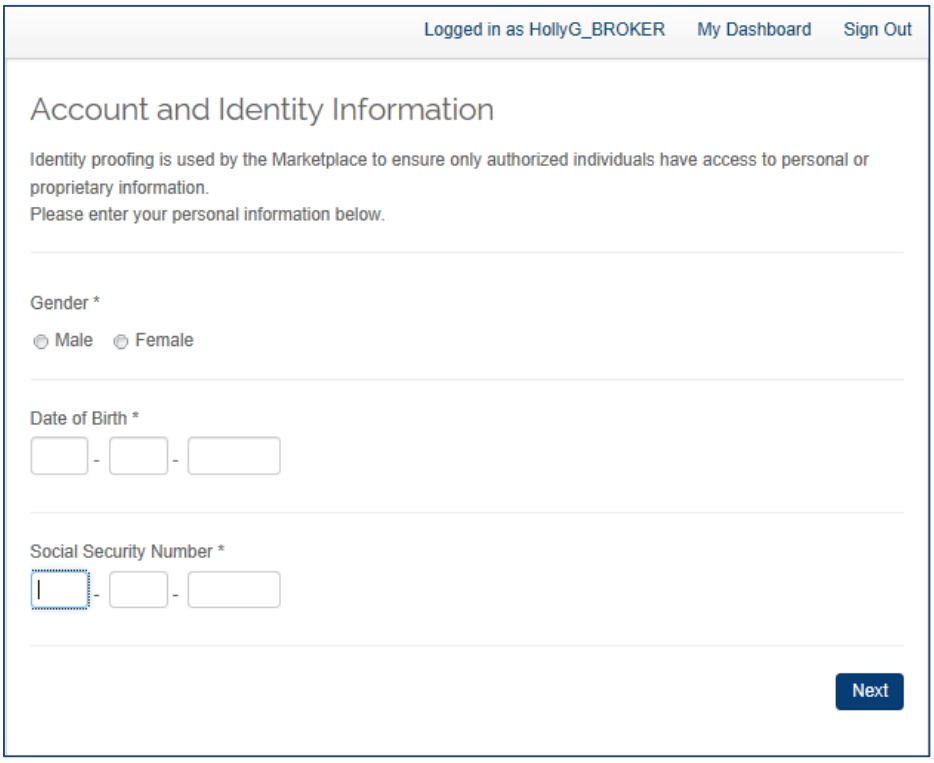
3. After you enter your Invitation Code and State License Number, your first and last name and email address should populate. Enter your address. (See next screen to continue).



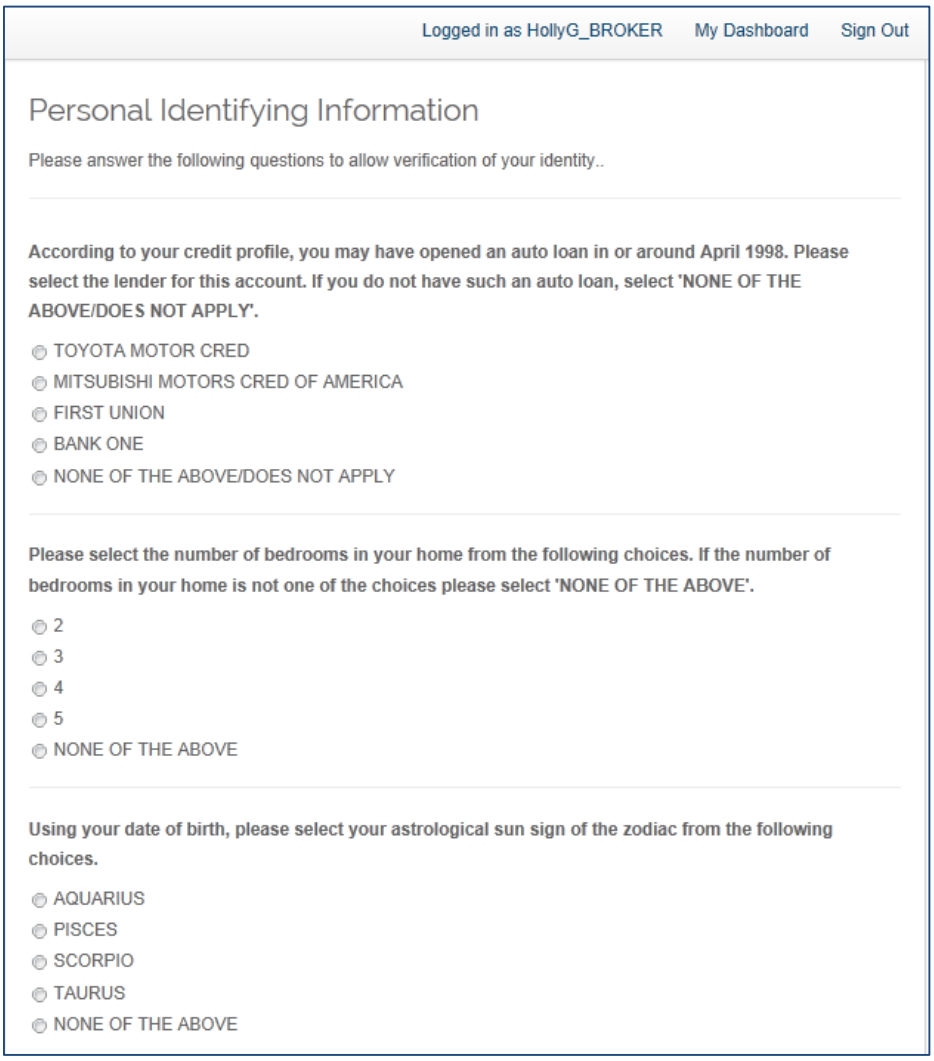
3. (Continued). Enter your telephone number and select your preferred language. You must attest to three statements before proceeding with account creation. Click *Create an Account*.



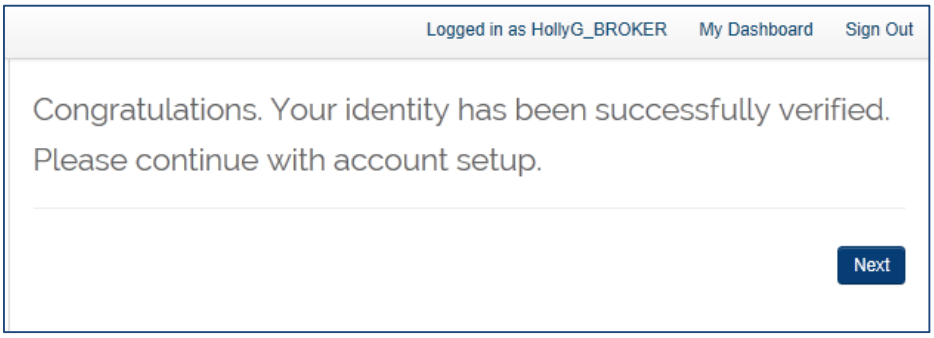
4. On the **Account and Identity Information** page, indicate your Gender and enter your Date of Birth and Social Security Number. Click *Next*.



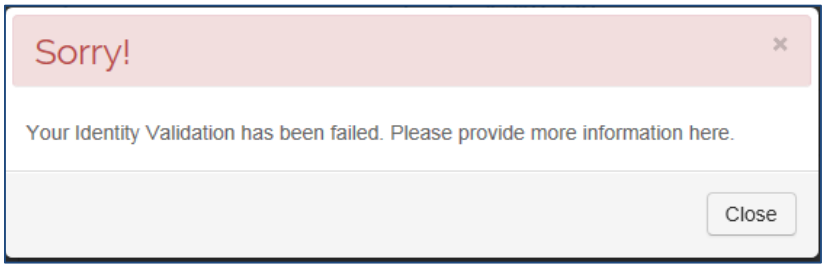
5. You will be presented with questions that have been generated to verify your identity. Answer the questions correctly and click *Next*.



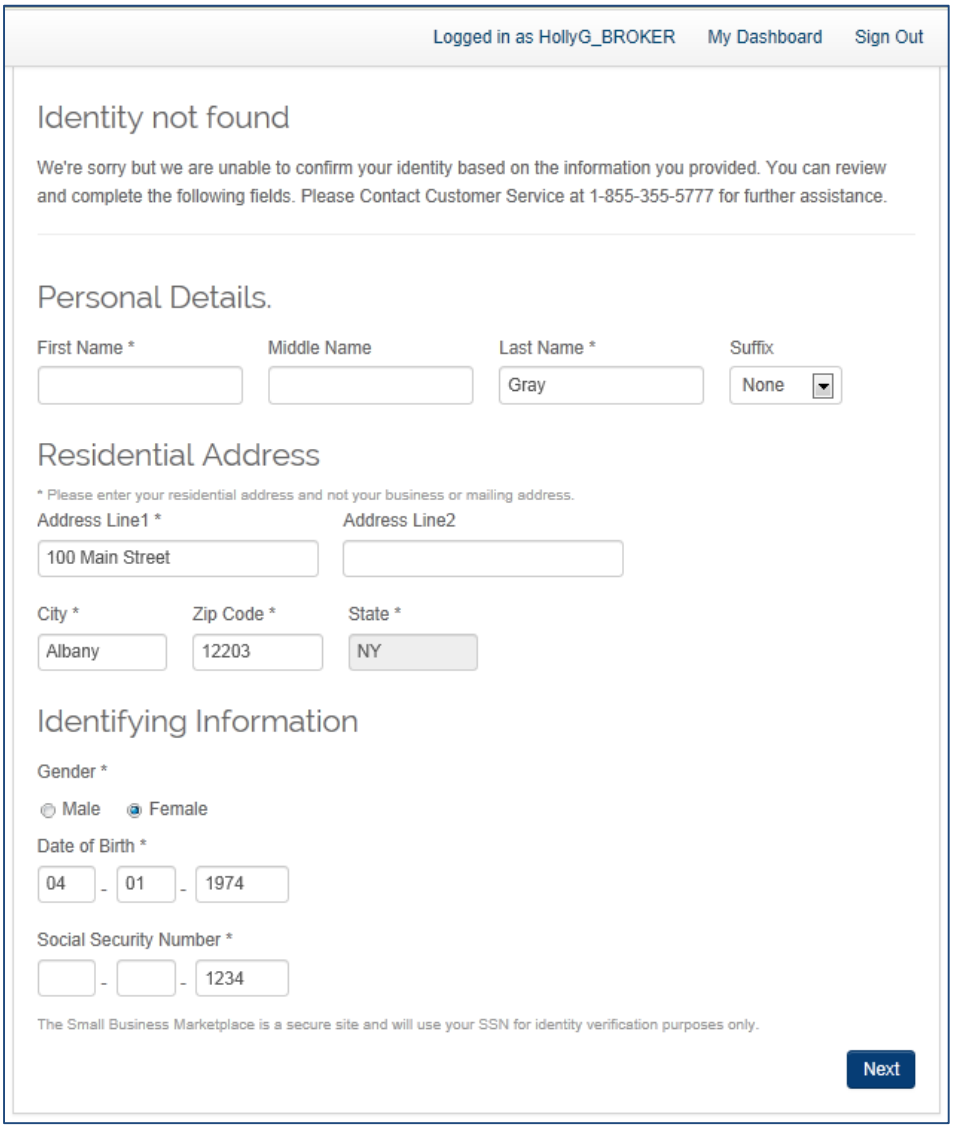
6. If you successfully answer the identity verification questions, a confirmation screen will appear. Click *Next* to continue with Account Set-up.



7. If Identity Proofing is unsuccessful, the following message will display. Click *Close*.

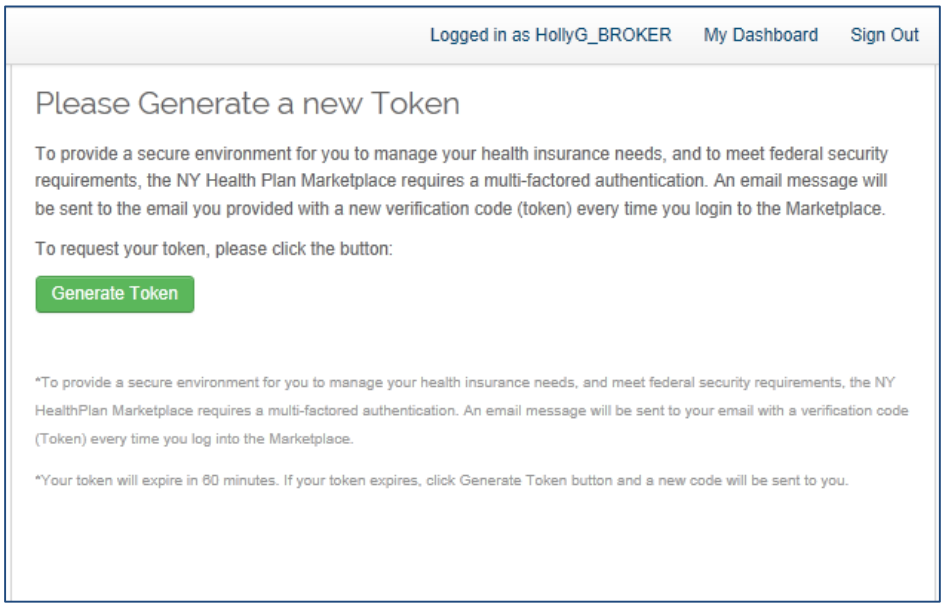


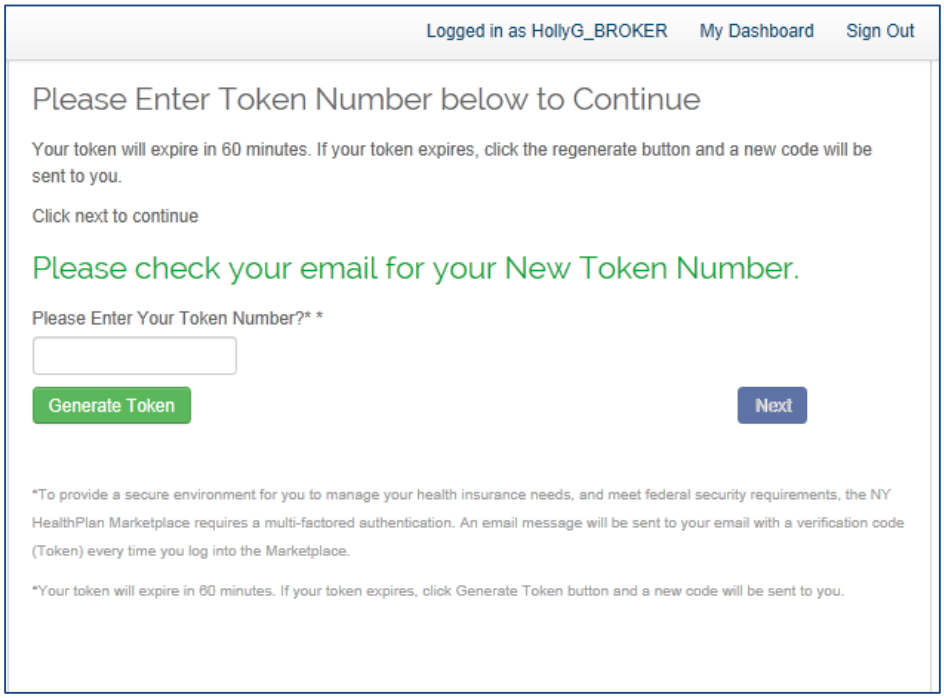
8. The **Personal Details** page will display, allowing the broker to make any necessary changes. Once changes have been made, click *Next*. The broker will be taken back through the Personal Identifying Information questions.



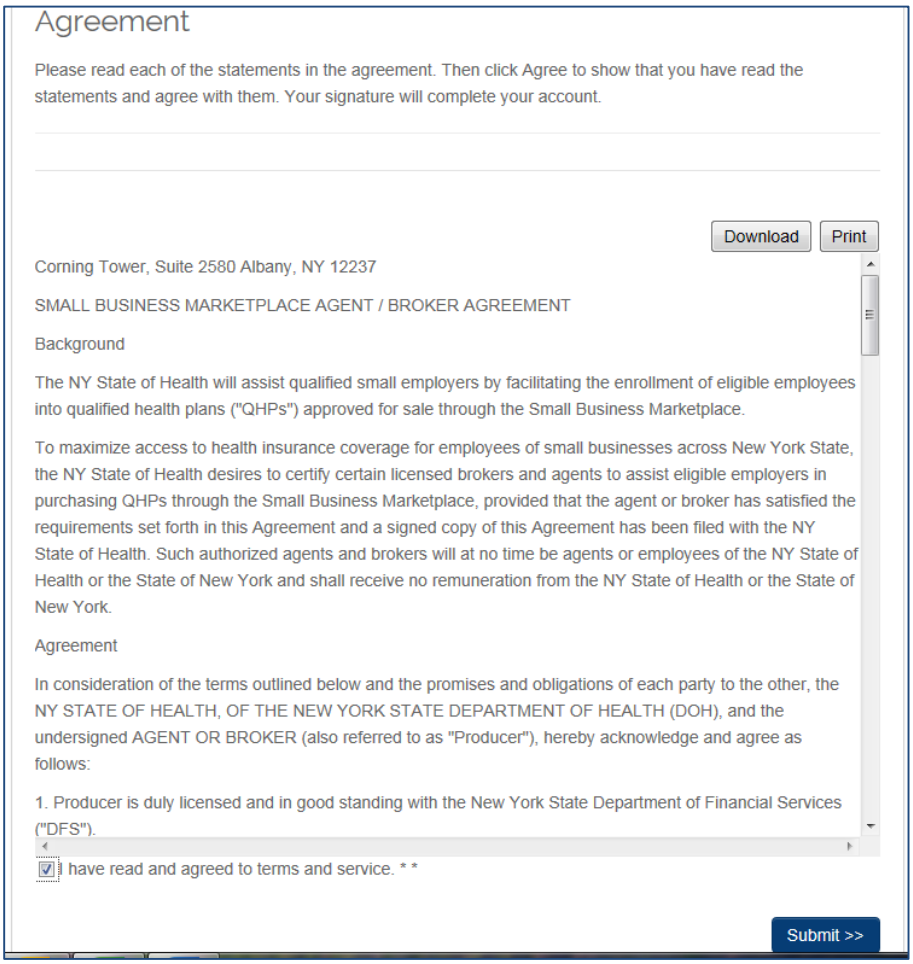
9. After successfully passing Identity Proofing, you will be prompted to generate a token. Click *Generate Token*. This token will be sent to the email you entered when you created your NY.gov ID. After retrieving this token from your email, copy and paste it into the **Please Enter Your Token Number** field and click *Next***.**

   Please note: Generate a new token each time you access your account. The token is valid for 60 minutes. If this process is interrupted and you must continue the application process at a later time, click the **Generate Token** button again to receive a new token.

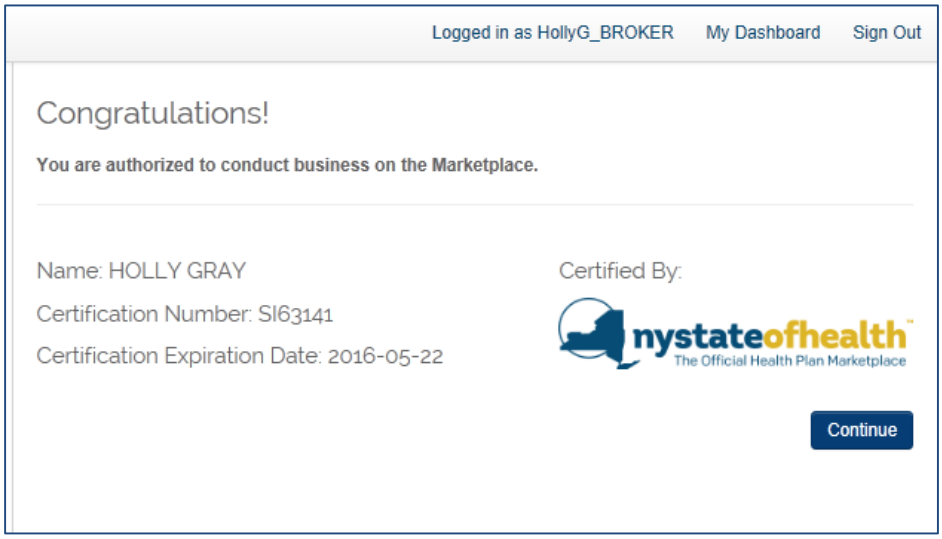




10. On the **Agreement** page, there are options to *Download* and *Print* the Agreement. Once you have read it, check the **I have read and agreed to terms and service** box and click *Submit*.

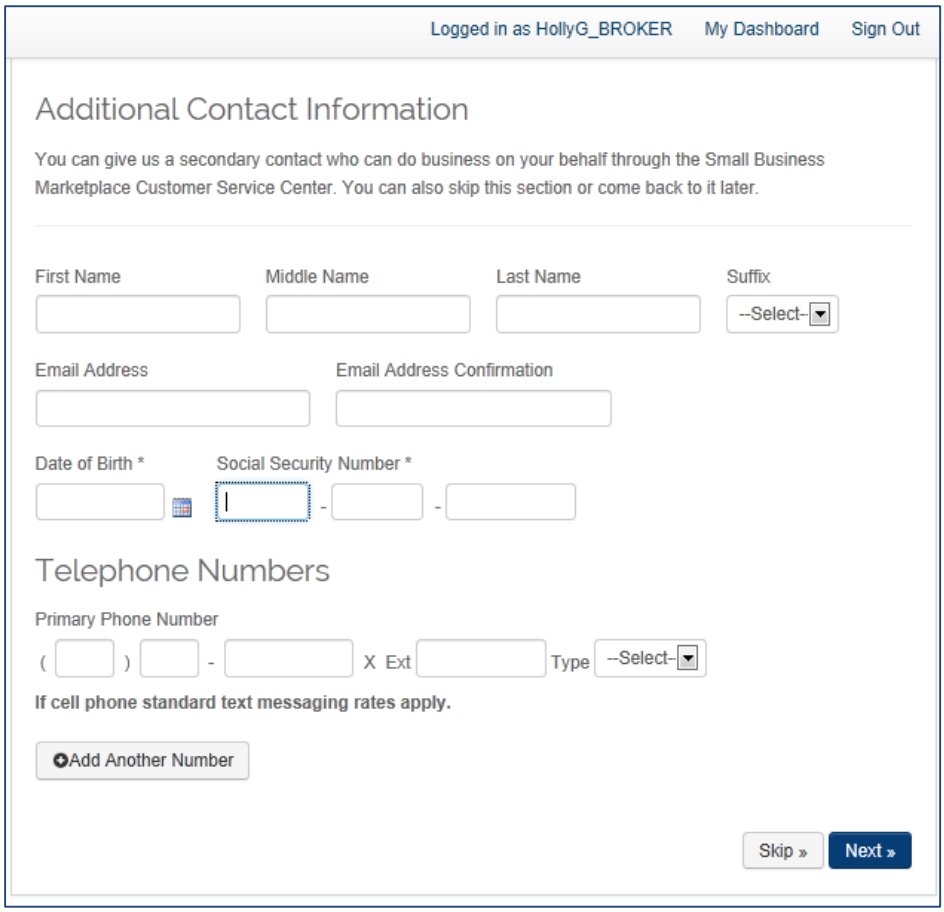


11. Click *Continue* on the **Congratulations** message page.

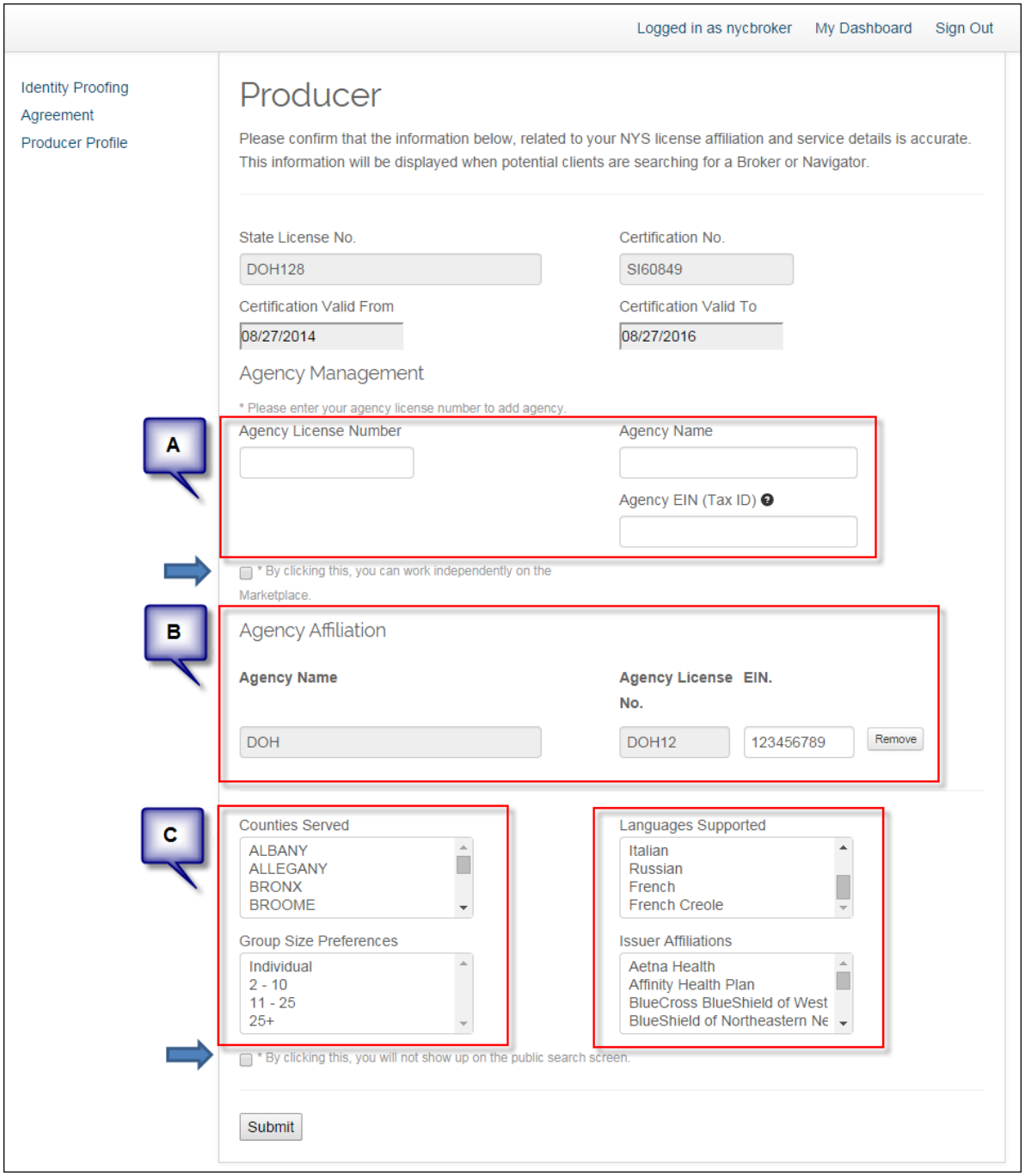


12. On the **Additional Contact Information** page, either complete all of the fields and click *Next* or leave the page blank and click *Skip*.

    Please note: A broker's secondary contact will be able to make changes on behalf of the broker if added by the broker during account setup or later. The secondary contact will have to call customer service with the broker's certification number to make any changes.

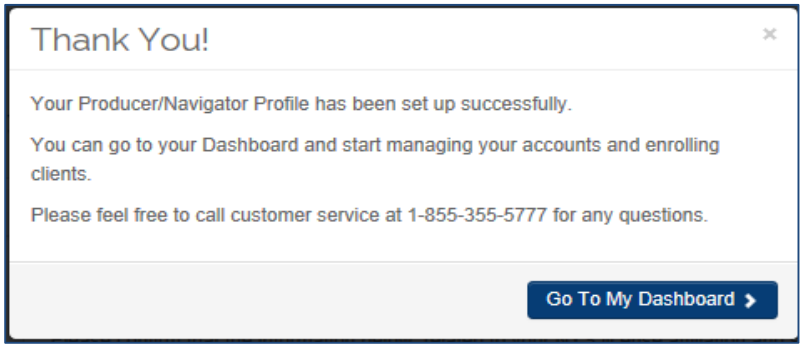


13. On the **Producer** profile page, enter the appropriate information and click *Submit*.

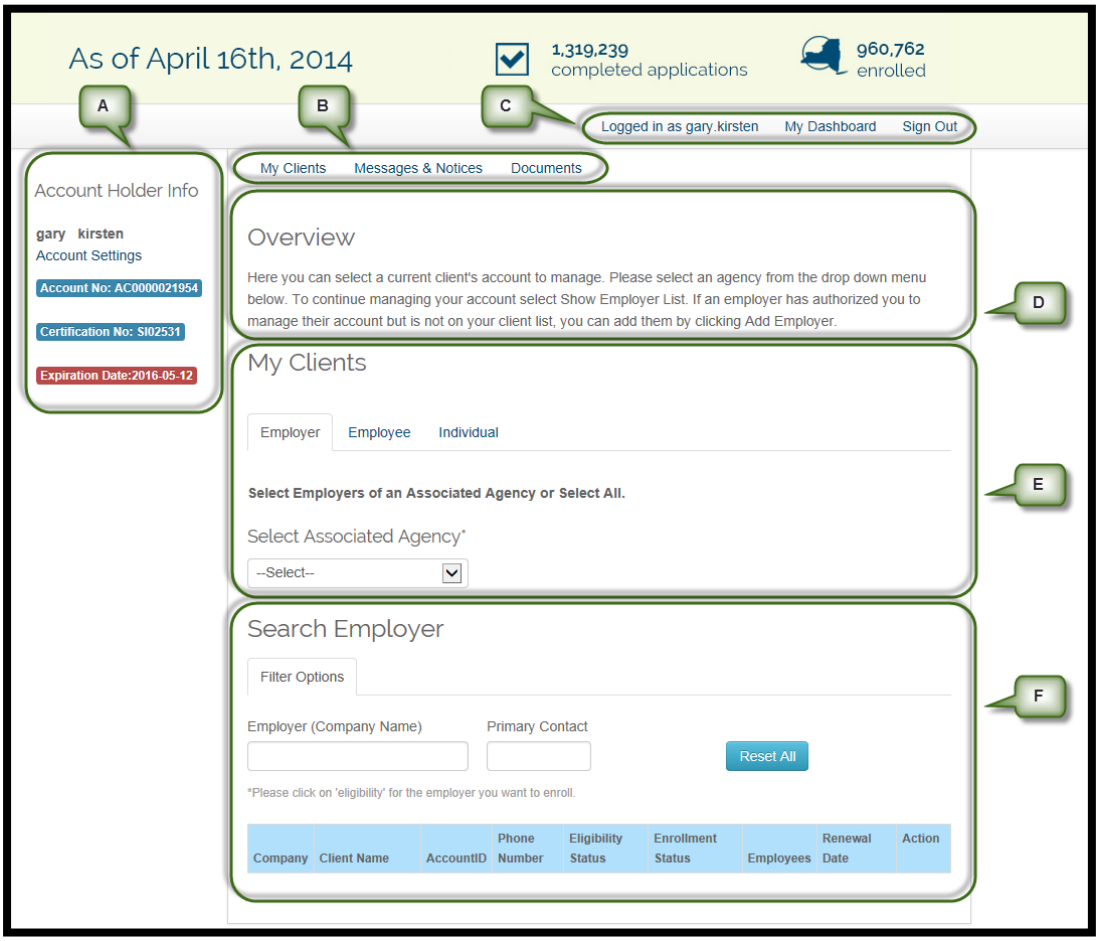


A. To enroll groups with an agency affiliation, enter the Agency License Number – agency name will populate – then enter the EIN. You can also enroll groups independently by checking the box below.
B. If you already have an agency affiliation, the name and license will populate, but you must still enter the agency EIN in order to proceed. You can also remove an affiliation here.
C. You can select counties in which you do business, and other preferences by which prospective clients can search for your profile in the "find a broker" function. You can also choose to NOT have your information searchable by clicking the box below.

14. At the **Thank You** message prompt, click *Go to My Dashboard* to display the broker's dashboard (see next page).



15. The **Broker Dashboard** allows access to the broker's clients to create, edit, and maintain client accounts.



Use the following tags to identify **Broker Dashboard** page elements.

A. **Account Holder Information** section: User's first and last name, Account Settings link, **Account Number, Broker Certification Number**, and **Expiration Date**.
B. Navigation Tabs for **My Clients, Messages & Notices** and **Documents**.
C. Username; **My Dashboard** and **Sign Out** links.
D. **Overview** section.
E. **My Clients** section: **Employer, Employee** and **Individual** tabs, **Select Associated Agency** dropdown will allow user to work with either direct clients or a specific agency.
F. **Employer (Company Name)** and **Primary Contact** text fields, **Reset All** and **Search** buttons, Client display table.