Get Started

Thank you for your interest in working with Healthfirst. This quick reference guide will help you navigate the Appointment and Recontracting process with Healthfirst.

Before beginning this process, please have the following documents accessible on your computer: your National Producer Number (NPN), your renewed NYS Life/Accident/Health license, your Errors and Omissions insurance documents, and your Banking Information. You will need these documents to complete the onboarding and recontracting process.

If you have any questions or need additional assistance, our dedicated Broker Services unit is here for you. Please call 1-855-456-3668, Monday to Friday, 9am–5pm.

Note: The preferred browsers to complete these tasks are Internet Explorer and Chrome.

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Click on the links below to view the associated workflow:

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1. Visit hfbrokers.org. Under the “Small Business Plans” section, click Get Appointed to begin the Broker Appointment and Onboarding process.

2. Enter your information in the required fields.

   For Onboarding Type, select one of the two below:

   **Agent:** Onboarding as an individual agent (commission earned will be paid to the individual).

   **Agency:** Onboarding on behalf of your agency (commission earned will be paid to the agency).
Dear John Smith,

You have been invited to onboard with us! To accept this invitation, please use the information below to complete your application online.

- **Site URL**: [Login]
- **User ID**: johso@dm.org
- **Password**: Jsmith@746323

3 You will receive a confirmation email at the email address entered.

Click **Login** to proceed.

4 Enter the **Temporary Credentials** provided in the email.

When finished, click **Submit**.
5 Follow the instructions to create a **unique password**.

Then click **Change Password**.

6 **Agent**: Enter your Social Security Number.

**Agency**: Enter your Tax ID.
7 Ensure the NPN Lookup Results are correct.

If they are, check the box "I authorize Healthfirst to request NIPR for a PDB Report". Then click Submit.

8 Under the General tab, some details will be auto-populated. Enter the information in the blank fields.

Once all fields are populated, click Save.

Note: Do not click Submit until all tabs are completed.
Under the **Licenses** tab, select the applicable "NY" license.

Then select the **Upward Arrow** to upload a copy of the License.

When complete, click **Save**.

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**Note:** Some questions may require additional comments and documents.

When all questions are complete, click **Save**.
11. Under the **Insurance tab**, complete all required fields and select the **Upward Arrow** to upload a copy of your E&O Insurance.

**Note**: An error will pop up if the given value is less than $1,000,000.

When finished, click **Save**.

12. Under the **Banking Information** tab, enter the required fields.

For **Payment Type**, pick **one** of the two below:

1. **ACH**: Enter a **Bank Routing Number**, **Bank Account**, and **Bank Account Type**.

2. **Check**: Enter the **address** the check should be mailed to.

Then upload the following:

- Completed W-9 document
- Copy of a voided check

When finished, click **Save**.
You have successfully submitted an application.

Click OK to close the message.

If you have any additional questions regarding your onboarding application with Healthfirst, contact Broker Services from Monday to Friday, 9am-5pm, at 1-855-456-3668.

Note: You may also log back into your account at anytime to check the status.
If your application was approved, you will receive an email from Healthfirst with more information.

To get started, click on the link in the email.
Recontracting

Thank you for working with Healthfirst. We require renewal of your License, Errors & Omissions Insurance to maintain your appointment.

**Note:** All renewals must be completed online; they will not be accepted via email.

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1. **You will receive an Automated Email Notification.** Click **Your Secure Account link** to log in to SAP.

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2. **Log in** to your account.

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**Dear Robert,**

We’re writing to let you know that your broker license will **expire in 90 days**.

You must have a current and active New York State license to engage in the sale of Healthfirst insurance products, consistent with the terms of your agreement with Healthfirst.

**Failure to update your license will result in the termination of your appointment with Healthfirst and possible forfeiture of your commissions.**

Please update your information as soon as possible by logging in to your secure account.

Download our step-by-step guide through the license renewal process.

If you have any questions about this information or believe you have received this message in error, please contact Broker Services at 1-855-456-3666, Monday to Friday, 9am–5pm.
3 Click the **plus sign symbol** on the upper right corner of the screen. Then select **Recontracting**.

4 Enter **Agent or Agency NPN**. Then click **Search for Producer** to retrieve the NPN details.
5 Select **Producer Lookup Information**. Then click **Submit**.

6 A Recontracting case has been created. Under the **General tab**, enter the **required fields**. When finished, click **Save**.

**Note:** Do not click **Submit** until all tabs are completed.
7 Under the **Licenses tab**, select the updated License details (license renewal).

Then **upload a copy of License listed**.

When finished, click **Save**.

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8 Under the **Insurance tab**, enter **Insurance Information** (insurance renewal).

Then **upload copy of Errors & Omissions Insurance** with $1,000,000 limits and other required fields.

When finished, click **Save**.
9 Under the **Attestation** tab, type your signature.

**Note:** Signature must be identical to the signature in the General tab (case sensitive).

When finished, click **Save** and then click **Submit**.

10 Your Recontracting Case was submitted successfully.

**Note:** You may check in on your renewal anytime. Once it appears as “Closed”, your renewal was processed.