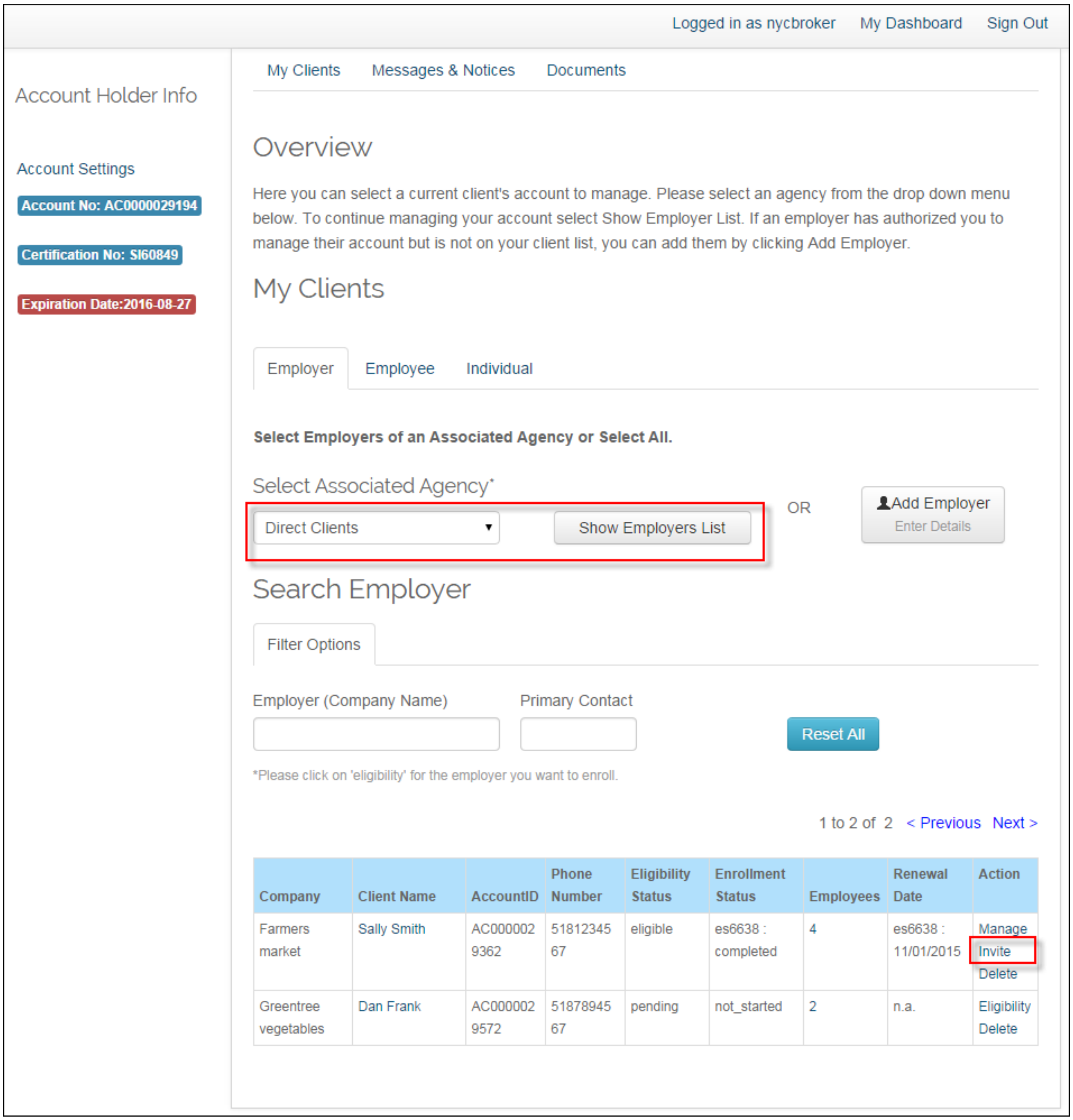
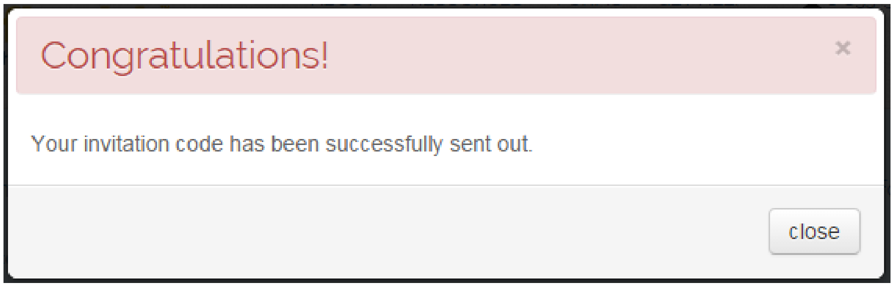
How to Invite Client to Access Their Account

A broker who has created an account on behalf of a small group client can invite the client to access their account.

1. From the Broker Dashboard, select Associate Agency or Direct Clients from the drop down menu and click on Show Employers List. Click *Invite* next to the chosen employer.

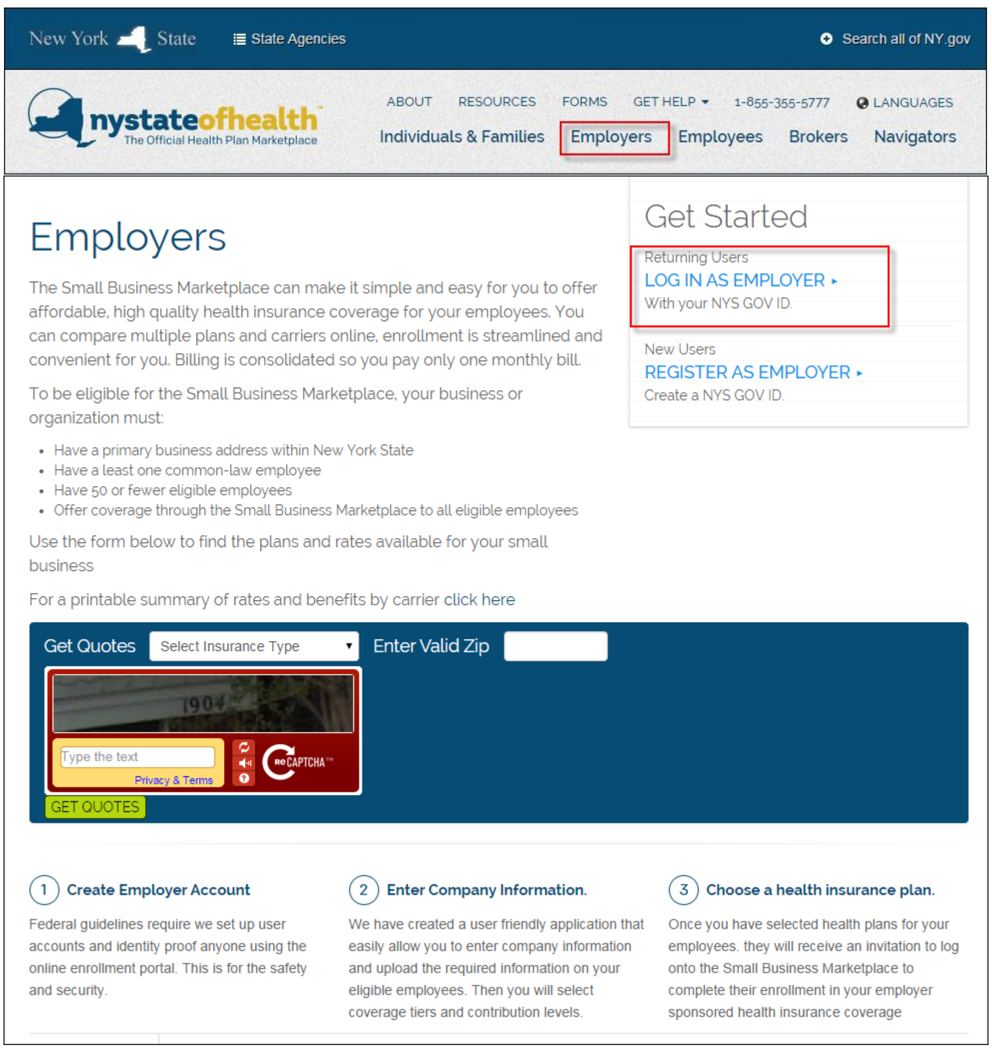


2. You will see a Congratulations message pop up. Close this message.



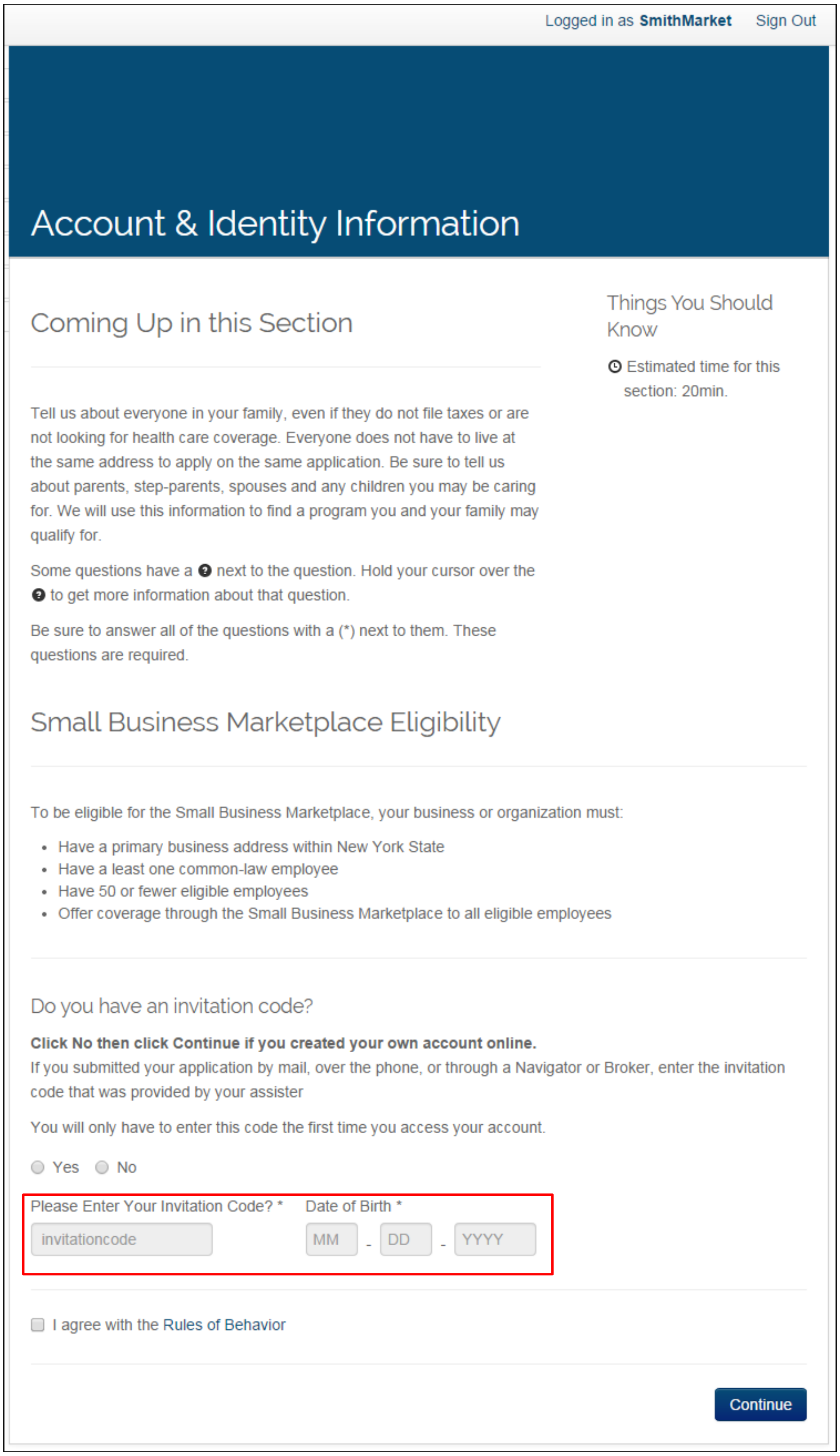
3. The small group client will receive an email with an **invitation code**.

4. The client must first create a NY.gov ID before accessing the account. Please see "How to Create a NY.gov ID" user guide. After client's NY.gov ID has been created, he or she can go to the NY State of health main landing page: www.nystateofhealth.ny.gov, click on the Employer tab, and then select the option to "Log in as Employer".

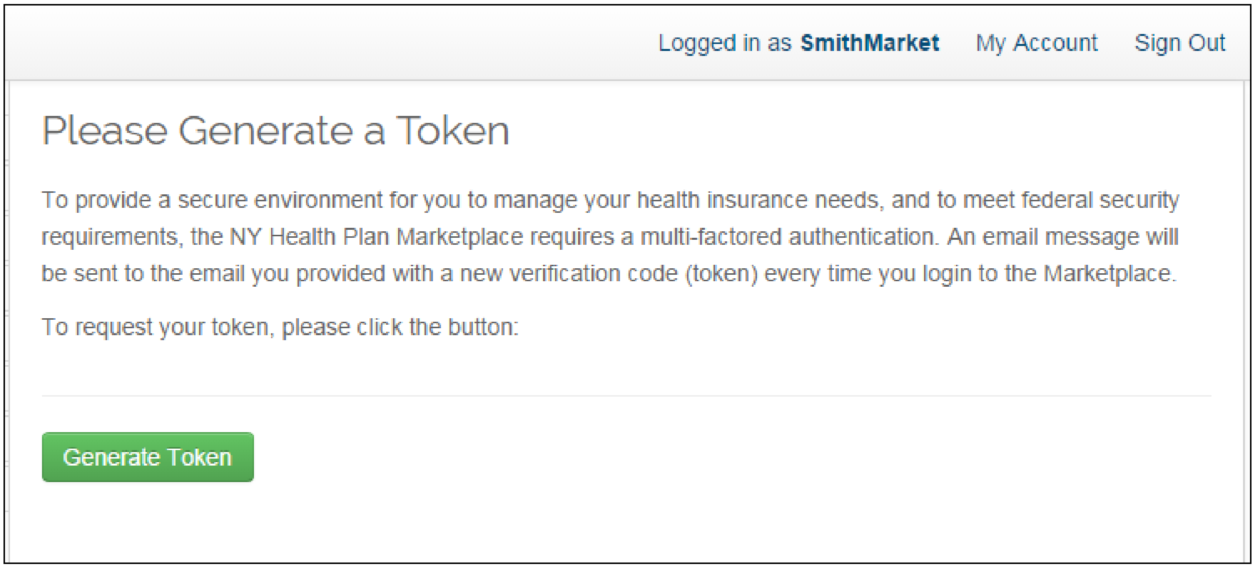


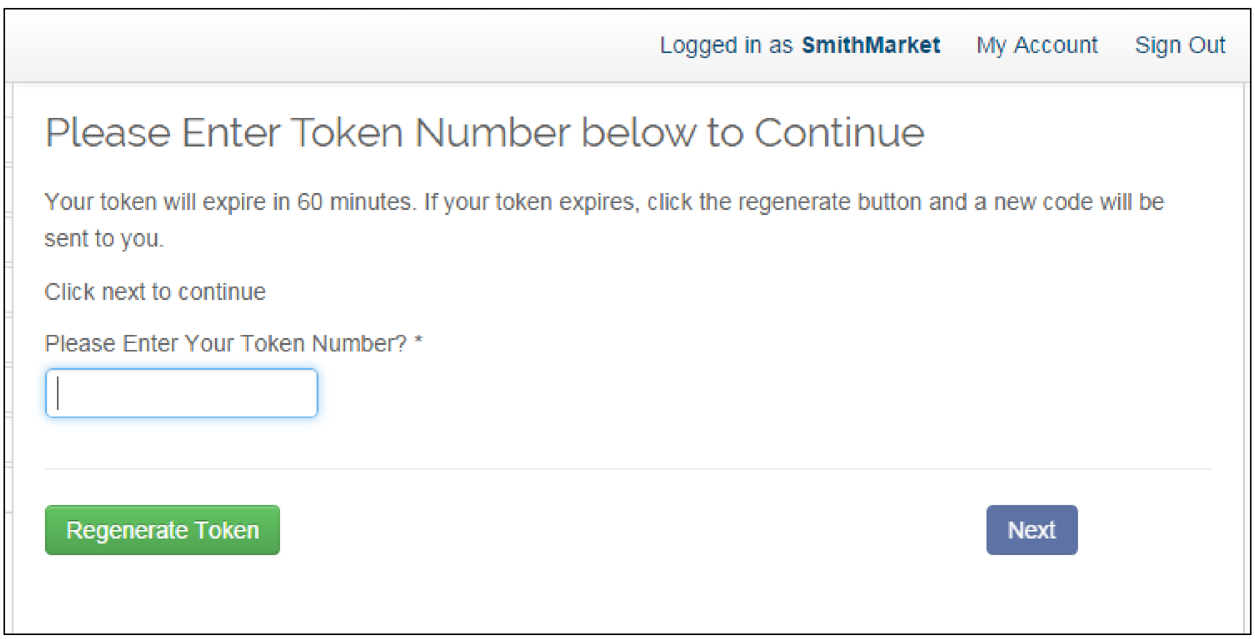
5. Client/Employer must then enter the **invitation code** from the email received earlier, confirm Date of Birth, agree with the Rules of Behavior, then click "Continue".

Please note: Clients who create their own accounts from the start do NOT need an invitation code.

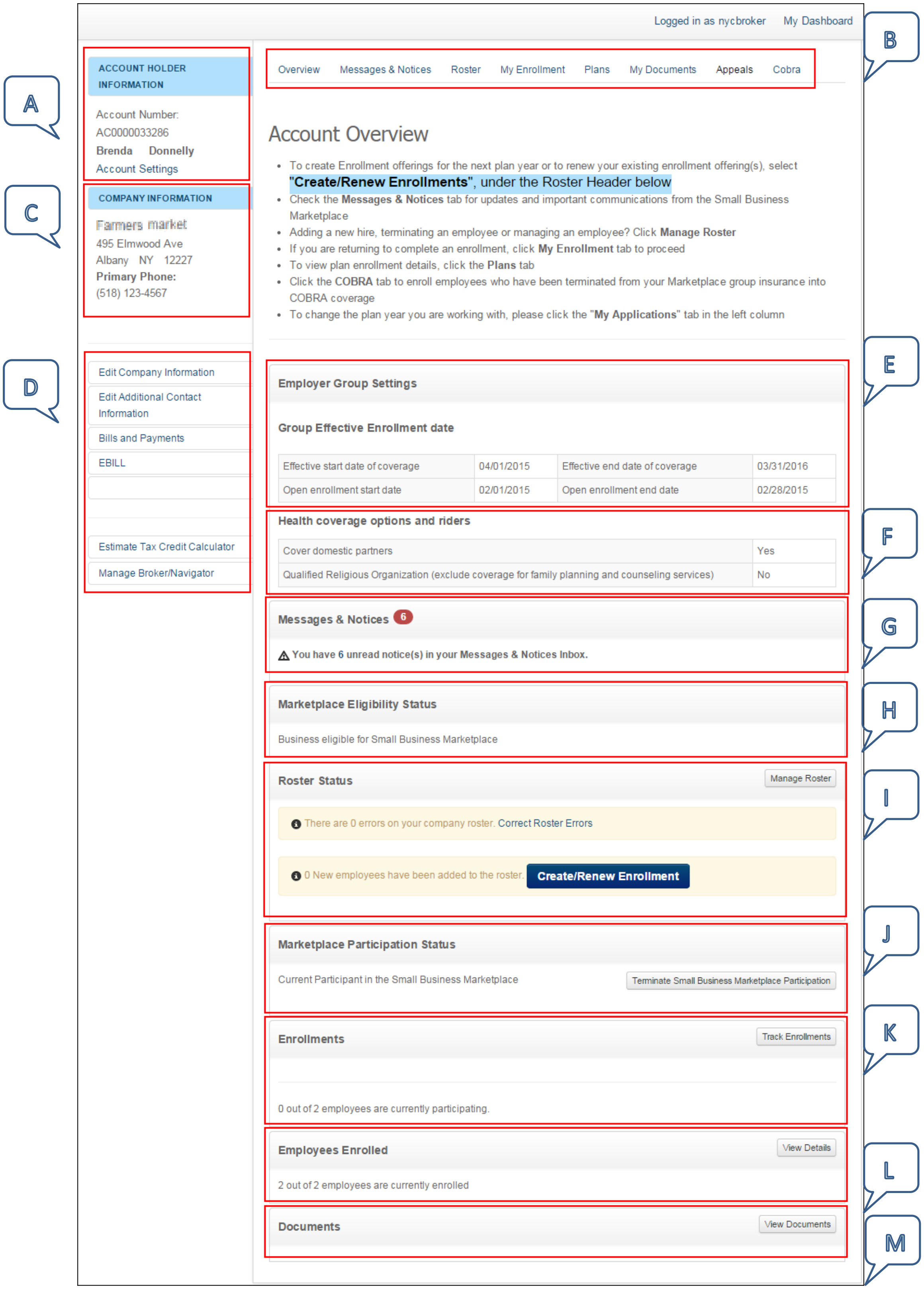


6. Client will be prompted to generate a token.
   Click Generate Token. This token will be sent to the email entered when the NY.gov ID was created. After retrieving this token from email, it must be entered into the Please Enter Your Token Number field and click Next. *To avoid errors, please copy and paste code instead of attempting to type it out.*





7. Employer Dashboard – see tags on the following table for item descriptions.



Tag	Description
A	**ACCOUNT HOLDER INFORMATION**: Account holder's username, **Account Number** and the **Account Settings** link. The **Account Settings** page components may be expanded or collapsed by clicking the plus sign (**+**) in the appropriate section. Click the **Edit** button to change settings for that section. Click the **Back** button to return to the dashboard.
B	Top Navigation Tabs: • **Overview** • **Messages & Notices** • **Roster** • **My Enrollment** • **Plans** • **My Documents** • **Appeals** • **COBRA**
C	**COMPANY INFORMATION**: Company name, address and **Primary Phone** number
D	Left Navigation Links to: • **Edit Company Information** page • **Edit Additional Contact Information** page • **Bills and Payments** page • **eBill** • **Estimate Tax Credit Calculator** • **Manage Broker/Navigator** (Click the **Find a Broker/Navigator/Application Counselor** button to search for a broker/navigator).
E	**Employer Group Settings**: Displays group effective enrollment start and end dates, open enrollment start and end dates. New groups and renewal groups can *Extend Enrollment End Date* here.
F	**Health Coverage options and riders**: Displays status of selected options/riders.
G	**Messages & Notices**: Displays number of unread messages and notices.
H	**Marketplace Eligibility Status:** Displays the current eligibility status.
I	**Roster Status**: • **Manage Roster** button • **Correct Roster Errors** link • **Create/Renew Enrollment** link
J	**Marketplace Participation Status:** Contains **Terminate Small Business Marketplace Participation** link. Will change to **Reinstate SBM Participation** when group terminates.
K	**Enrollments**: Displays the number of days of open enrollment and how many employees are currently participating. Click the **Track Enrollments** button to navigate to the **Current Enrollments** page.
L	**Employees Enrolled**: Displays number of employees currently enrolled. Click the **View Details** button to view the **Employee Plans** page.
M	**Documents:** View or upload any required documents.