

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.

Logged in as nycbroker My Dashboard Sign Out

My Clients Messages & Notices Documents

Account Holder Info

Account Settings

Account No: AC0000029194

Certification No: SI60849

Expiration Date:2016-08-27

Overview

Here you can select a current client's account to manage. Please select an agency from the drop down menu below. To continue managing your account select Show Employer List. If an employer has authorized you to manage their account but is not on your client list, you can add them by clicking Add Employer.

My Clients

Employer Employee Individual

Select Employers of an Associated Agency or Select All.

Select Associated Agency*

Direct Clients Show Employers List

OR Add Employer Enter Details

Search Employer

Filter Options

Employer (Company Name) Primary Contact

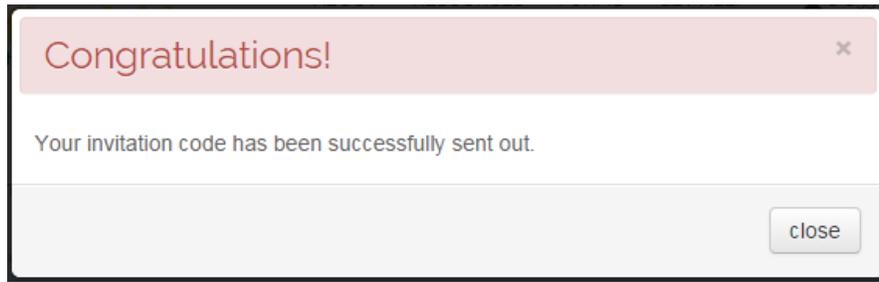
Reset All

*Please click on 'eligibility' for the employer you want to enroll.

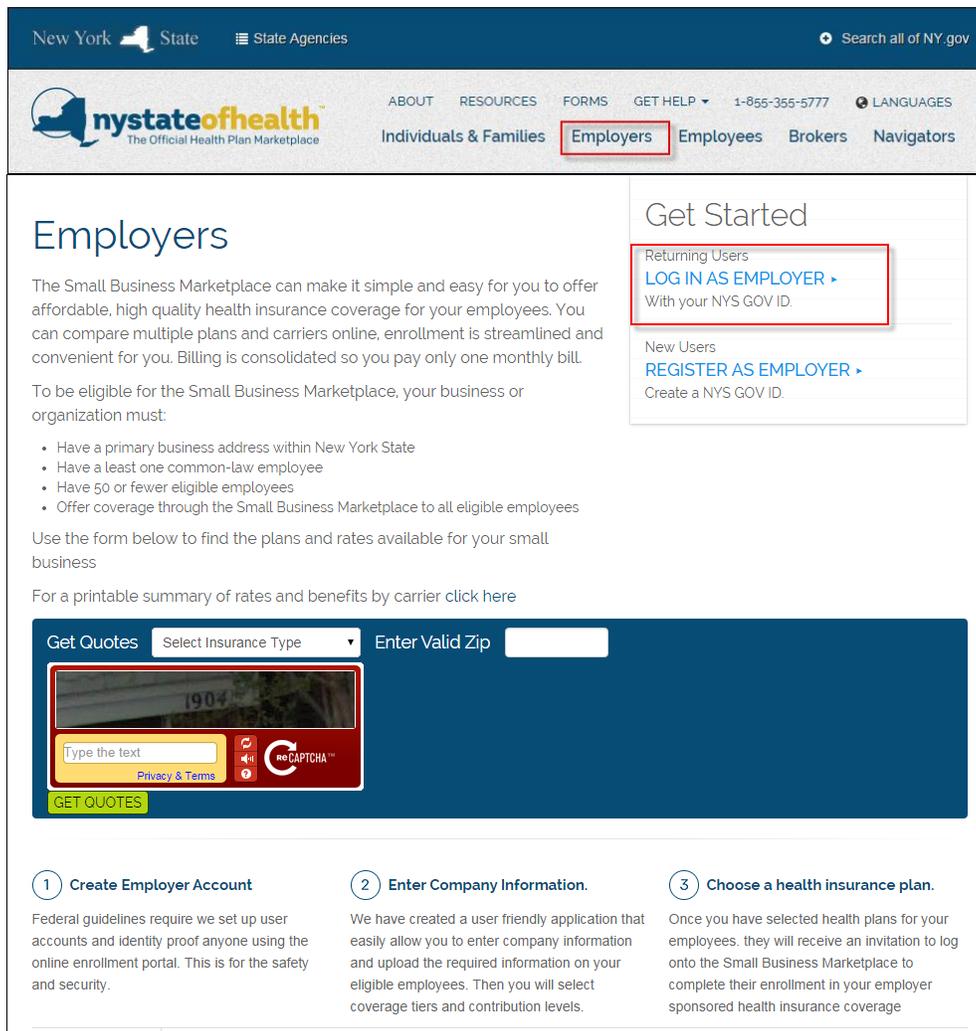
1 to 2 of 2 < Previous Next >

Company	Client Name	AccountID	Phone Number	Eligibility Status	Enrollment Status	Employees	Renewal Date	Action
Farmers market	Sally Smith	AC0000029362	5181234567	eligible	es6638 : completed	4	es6638 : 11/01/2015	Manage Invite Delete
Greentree vegetables	Dan Frank	AC0000029572	5187894567	pending	not_started	2	n.a.	Eligibility Delete

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.

Logged in as **SmithMarket** Sign Out

Account & Identity Information

Coming Up in this Section

Tell us about everyone in your family, even if they do not file taxes or are not looking for health care coverage. Everyone does not have to live at the same address to apply on the same application. Be sure to tell us about parents, step-parents, spouses and any children you may be caring for. We will use this information to find a program you and your family may qualify for.

Some questions have a **?** next to the question. Hold your cursor over the **?** to get more information about that question.

Be sure to answer all of the questions with a (*) next to them. These questions are required.

Things You Should Know

- Estimated time for this section: 20min.

Small Business Marketplace Eligibility

To be eligible for the Small Business Marketplace, your business or organization must:

- Have a primary business address within New York State
- Have a least one common-law employee
- Have 50 or fewer eligible employees
- Offer coverage through the Small Business Marketplace to all eligible employees

Do you have an invitation code?

Click No then click Continue if you created your own account online.

If you submitted your application by mail, over the phone, or through a Navigator or Broker, enter the invitation code that was provided by your assister

You will only have to enter this code the first time you access your account.

Yes No

Please Enter Your Invitation Code? * Date of Birth * - -

I agree with the Rules of Behavior

Continue



- 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.*

Logged in as **SmithMarket** [My Account](#) [Sign Out](#)

Please Generate a Token

To provide a secure environment for you to manage your health insurance needs, and to meet federal security requirements, the NY Health Plan Marketplace requires a multi-factored authentication. An email message will be sent to the email you provided with a new verification code (token) every time you login to the Marketplace.

To request your token, please click the button:

[Generate Token](#)

Logged in as **SmithMarket** [My Account](#) [Sign Out](#)

Please Enter Token Number below to Continue

Your token will expire in 60 minutes. If your token expires, click the regenerate button and a new code will be sent to you.

Click next to continue

Please Enter Your Token Number? *

[Regenerate Token](#) [Next](#)

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

The screenshot shows the Employer Dashboard interface. At the top right, it says "Logged in as nycbroker My Dashboard". A navigation bar contains links for Overview, Messages & Notices, Roster, My Enrollment, Plans, My Documents, Appeals, and Cobra. The main content area is titled "Account Overview" and includes a list of instructions for enrollment and management. The left sidebar contains sections for Account Holder Information, Company Information, and a menu of actions like Edit Company Information, Bills and Payments, and Manage Broker/Navigator. The main content area is divided into several sections: Employer Group Settings (with a table for enrollment dates), Health coverage options and riders, Messages & Notices (showing 6 unread notices), Marketplace Eligibility Status, Roster Status (with a "Manage Roster" button and a "Create/Renew Enrollment" button), Marketplace Participation Status (with a "Terminate Small Business Marketplace Participation" button), Enrollments (with a "Track Enrollments" button), Employees Enrolled (with a "View Details" button), and Documents (with a "View Documents" button). Callout tags A through M are placed around the interface to identify specific elements.

ACCOUNT HOLDER INFORMATION

Account Number:
AC0000033286
Brenda Donnelly
Account Settings

COMPANY INFORMATION

Farmers market
495 Elmwood Ave
Albany NY 12227
Primary Phone:
(518) 123-4567

Overview Messages & Notices Roster My Enrollment Plans My Documents Appeals Cobra

Account Overview

- To create Enrollment offerings for the next plan year or to renew your existing enrollment offering(s), select **"Create/Renew Enrollments"**, under the Roster Header below
- Check the Messages & Notices tab for updates and important communications from the Small Business Marketplace
- Adding a new hire, terminating an employee or managing an employee? Click **Manage Roster**
- If you are returning to complete an enrollment, click **My Enrollment** tab to proceed
- To view plan enrollment details, click the **Plans** tab
- Click the **COBRA** tab to enroll employees who have been terminated from your Marketplace group insurance into COBRA coverage
- To change the plan year you are working with, please click the **"My Applications"** tab in the left column

Employer Group Settings

Group Effective Enrollment date

Effective start date of coverage	04/01/2015	Effective end date of coverage	03/31/2016
Open enrollment start date	02/01/2015	Open enrollment end date	02/28/2015

Health coverage options and riders

Cover domestic partners	Yes
Qualified Religious Organization (exclude coverage for family planning and counseling services)	No

Messages & Notices 6

⚠ You have 6 unread notice(s) in your Messages & Notices Inbox.

Marketplace Eligibility Status

Business eligible for Small Business Marketplace

Roster Status Manage Roster

🔍 There are 0 errors on your company roster. [Correct Roster Errors](#)

🔍 0 New employees have been added to the roster. [Create/Renew Enrollment](#)

Marketplace Participation Status

Current Participant in the Small Business Marketplace Terminate Small Business Marketplace Participation

Enrollments Track Enrollments

0 out of 2 employees are currently participating.

Employees Enrolled View Details

2 out of 2 employees are currently enrolled

Documents View Documents

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: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • 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 <i>Extend Enrollment End Date</i> 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: <ul style="list-style-type: none"> • 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.