

How to Invite Client to Access Their Account

Brokers who create new Employer Accounts will no longer need to physically “invite” the Employer from their dashboard. Now, once the Eligibility is determined, the Invitation Code will appear in the upper right-hand corner of the Eligibility Determination Landing page.

If a Legacy Employer does not have an invitation code and needs access to their account, the Invite button will still be available in the Broker dashboard for each Legacy Employer that does not have an NY.Gov ID attached. For Legacy Accounts, follow the directions below to Invite an Employer who needs access to their account.

Please note: With changes to the NYSOH SBM system that took effect on 4/1/18, new Employers no longer have to go through the rigorous ID Proofing process involving Experian. Because of this, if a Legacy Employer needs access to their Legacy Account, they must call Customer Service to complete the request.

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.

AC0000050211 - Christa Smith
State Unique ID: 2017EIT License: EIT2017 Certification: SI00140 [View](#) Expiration: 2019-03-29 Status: Approved

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Employer **Employee** **Individual**

Search Employer
Select your Agency or Direct Clients from the drop down to view all associated Employers or click "Add New Employer" to start a new Employer application. Within the search result, you can search my client list by entering text in the filter or by sorting by column name.

Select Associated Agency*
testnew

Filter Option
Show All

Add New Employer

Filter: Show 50 entries

Results: 1 to 3 of 3

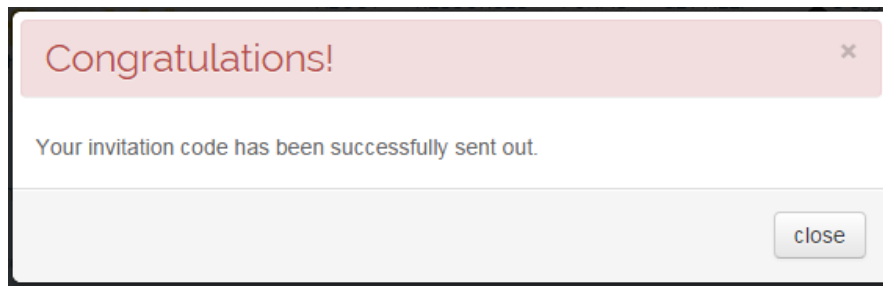
Company Name	Account ID	No. of Employees	Eligibility Status	Enrollment Status	Renewal Date	Action
Din Warehouse Primary Contact Name Caroline Reynolds	AC0000050843 Contact Number 518-555-1212	0	PENDING	N/A	N/A	eligibility delete
Five Guys Christa Johnson	AC0000034280 518-555-1212	7	ELIGIBLE	COMPLETED	06/01/2018	manage delete
Little Black Dress Lisa McDowell	AC0000058336 516-555-1212	0	ELIGIBLE	N/A	N/A	manage invite delete

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← Previous 1 Next →

1

2. A Congratulations message pop up will appear. *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. Once the Employer creates the NY.Gov ID, they must then call the NYSOH Marketplace Call Center at 1-855-355-5777 to complete the manual ID Proofing process. Documents may be needed to complete the process. Please wait to submit these documents as they will need to be sent to a separate department.