Provider Guide to Account Creation and Access

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HHS Accelerator System Requirements Overview

To access the HHS Accelerator System, organizations must first be approved for an HHS Accelerator Account. This guide provides detailed instructions on how organizations can request a new account. It also describes basic account requirements including an active internet connection and a compatible, JavaScript enabled browser. Finally it provides details of how your organization must identify system users and expected system user roles.

HHS Accelerator System Compatible Internet Browsers

You must have one of the following internet browsers installed on your computer:

- Microsoft Internet Explorer, Mozilla Firefox, Safari, and Chrome current version.

Enabling JavaScript

Follow the instructions below to ensure JavaScript has been enabled:

Microsoft Internet Explorer most current version

1. Open the **"Tools"** menu and select **"Internet Options."**
2. Click the **"Security"** tab.
3. Click **"Custom level"** button to customize your security settings.
4. Scroll down to **"Scripting,"** near the bottom of the list.
5. Under **"Active Scripting",** choose **"Enable."**
6. Verify Security Settings and click **"OK"**; verify Internet Options and click **"OK."**
7. Click the **"Reload"** icon.

Mozilla Firefox most current version

1. Open the **"Tools"** menu and select **"Options."**
2. Select the **"Content"** section.
3. Check the **"Block pop-up windows," "Load images automatically," "Enable JavaScript"** and "**Enable Java**" (if available) boxes.
4. Click **"OK."**
5. Click the **"Reload"** icon.

Safari most current version

1. Open the "**Safari"** menu and select "**Preferences."**
2. Select the "**Security"** section.
3. Select "**Enable plug-ins,**" "**Enable Java**" and "**Enable JavaScript**" from "Web Content" section.
4. Close the "**Security"** window.
5. Click the "**Reload"** icon.

Valid Email Account

Each system user must provide a valid email address to activate his or her NYC.ID which is required for NYC systems. An email address provided by your organization is preferred. However, it is also possible to provide a third party account such as Google, Yahoo or Windows Live. The first person to request an account for your organization must first activate their NYC.ID.

Selecting Users and Assigning Roles

Your organization needs to make some critical decisions regarding who will access the HHS Accelerator System and what role each user will play. Please consider the most appropriate individual(s) to:

- Manage your organization's relationships with the City and other funders
- Maintain your organization's profile
- Respond to Requests for Proposals from the City and/or other potential funders
- Sign contracts on behalf of your organization
- Submit budgets and invoices on behalf of your organization.

HHS Accelerator System access is divided into three categories: Financials, Procurements and Financials, and Procurements. Within the category you assign to a user, you must also assign a level. There are two levels, "Level 1" (L1) and "Level 2" (L2). Level 1 users have restricted, basic permissions in their assigned category and Level 2 users unrestricted permissions in their assigned category.

- **Financials Access**
  - **Level One**
    - Basic Permissions in the Financials, Documents Vault and Applications tabs.
  - **Level Two**
    - Basic Permission
    - Application Submission, Budget Submission/e-signature, Invoice Submission/e-signature and Document Sharing Permissions.

- **Procurements Access**
  - **Level One**
    - Basic Permissions in the Procurements, Document Vault and Applications tabs.
  - **Level Two**
    - Basic Permissions
    - Application Submission, Proposal Submission/e-signature and Document Sharing Permissions.

- **Financials and Procurements Access**
  - **Level One**
    - Basic Permission in the Financials, Procurements, Document Vault and Applications tabs.
  - **Level Two**
    - Basic Permissions
    - Application, Proposal Submission/e-signature and Budget Submission/e-signature, Invoice Submission/e-signature and Document Sharing Permissions.

Establishing an HHS Accelerator account is a two step process that requires you to first create a NYC.ID using a valid email address and then request an account using your newly created NYC.ID credentials.

For users requesting access to an existing account please review the *Accessing an Existing Account for New Users* section of this guide.

System User Access Table

System roles and common organizational levels for these roles are outlined in the table below.

Role	Tasks	L1 User	L2 User
Procurement	Begin Business Application	X	X
	Submit Business Application		X
	Select Services	X	X
	Submit Service Applications		X
	Begin Proposal	X	X
	Submit Proposal		X
	View Evaluation Scores		X
	Retract Proposal		X
	Cancel Proposal		X
	Show Proposal Comments	X	X
	Upload Documents	X	X
	Share Documents		X
Financials	Begin Business Application	X	X
	Submit Business Application		X
	Select Services	X	X
	Submit Service Applications		X
	View Budget	X	X
	Modify Budget	X	X
	Request Advance		X
	Cancel Modification		X
	Submit Invoice		X
	Delete/Withdraw Invoice		X
	View Invoice	X	X
	Upload Documents	X	X
	Share Documents		X

Creating a New NYC.ID

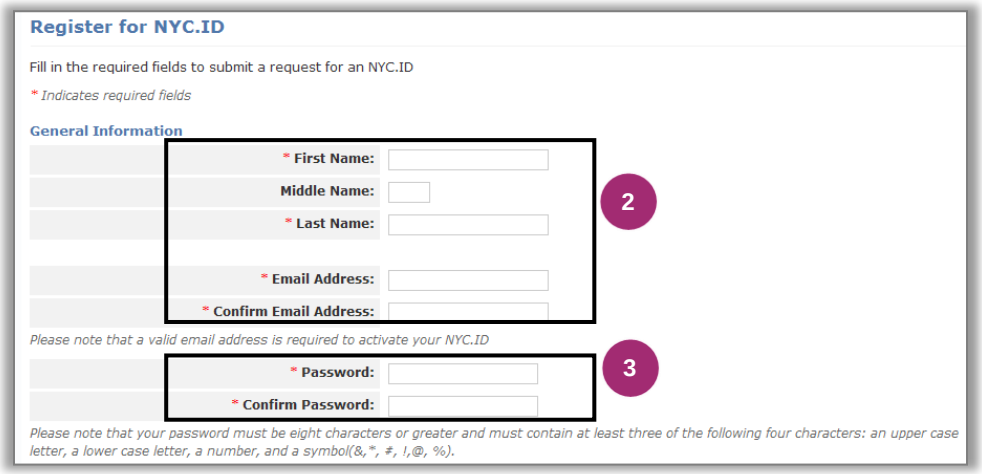
A NYC.ID is a secure, single sign-on that provides access to online services at multiple New York City government agency websites, including: Workforce1 and the New Business Accelerator Team. A valid NYC.ID is required for each HHS Accelerator System user. If you do not already have a valid NYC.ID, navigate to the HHS Accelerator System Login page (below) to create one, and follow the subsequent process.

> The individual who submits the initial request for your organization's HHS Accelerator Account will automatically be granted access to all system privileges.

nyc.gov/hhsaccelerator

1. Click the **"Create New NYC.ID"** link.

The fields marked by a red asterisk (*) are required.



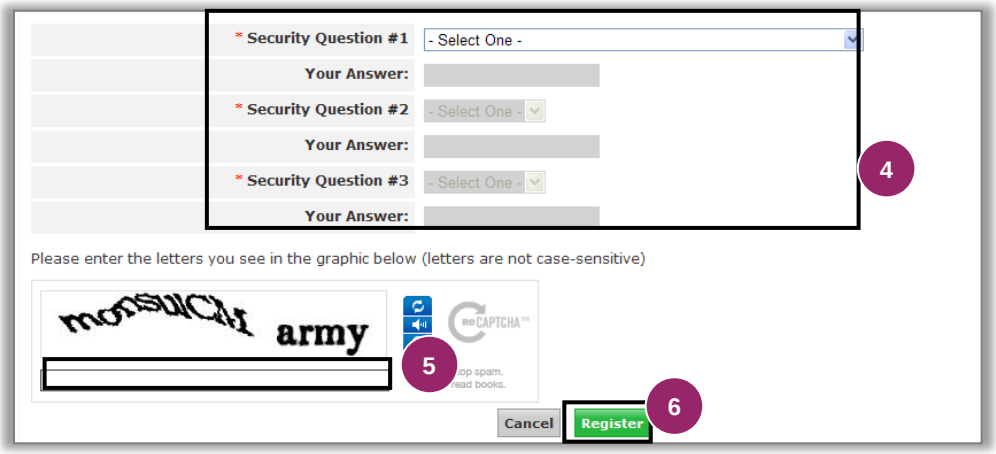
2. Enter required data to complete the registration form.

3. Create and confirm your **"NYC.ID Password."**

Passwords must be <u>at least</u> eight (8) characters long and contain (3) of the following:

- *An uppercase letter*
- *A lowercase letter*
- *A number*
- *One of these symbols (&*#!@%).*

Your first name, last name, email, or the word password are not allowed to be used.

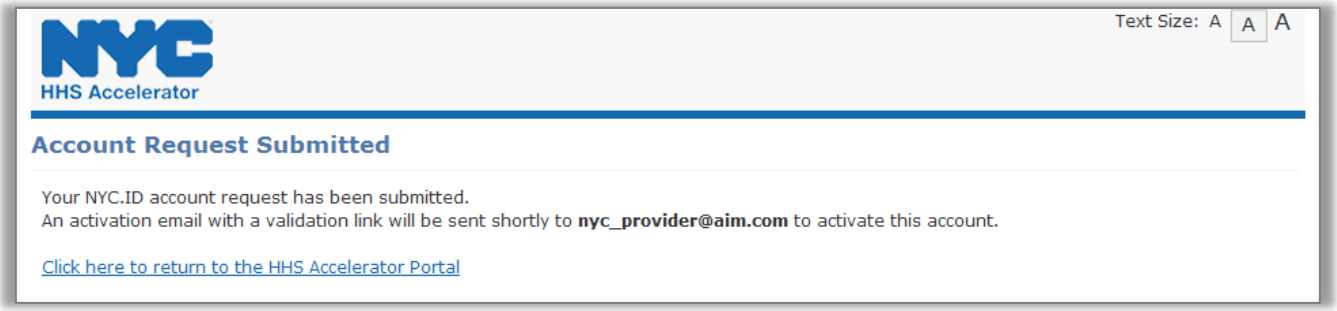


4. Select three security questions and provide your unique answers.

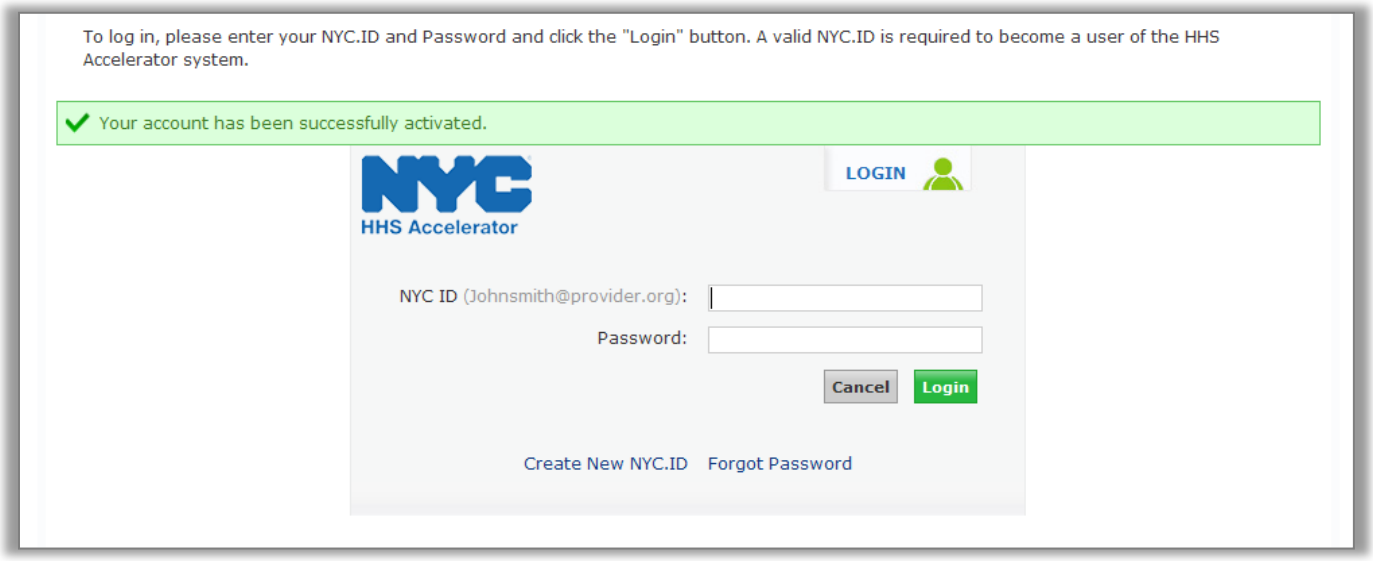
5. Enter the characters displayed in the CAPTCHA™ graphic.

6. Click **"Register"** to submit your request.

Once your request is successfully submitted, the system will direct you to the following screen:



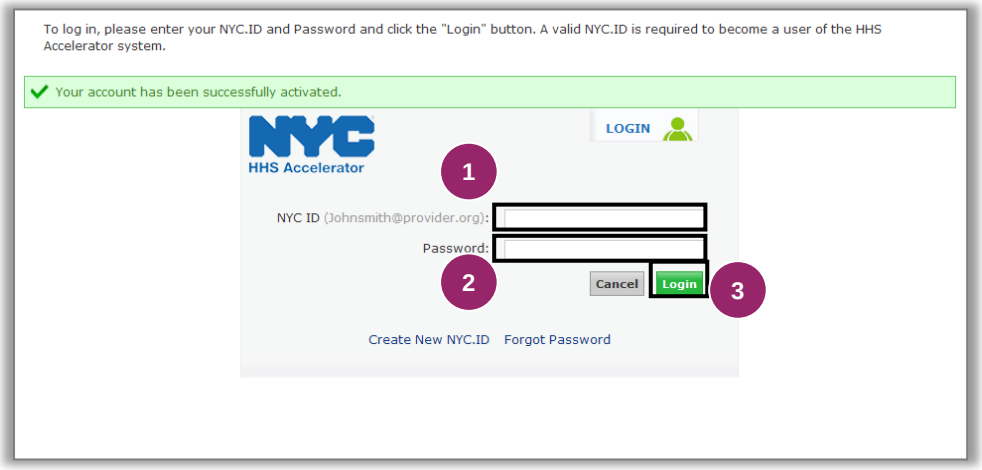
Once successfully submitted, check your email inbox associated with your NYC.ID for an automated validation email. To activate your account, click the validation link within the email, which will direct you to the HHS Accelerator System login screen. The system will display confirmation of your NYC.ID activation.



Now that you have successfully created and activated a NYC.ID, you may request an HHS Accelerator Account.

Requesting the Initial HHS Accelerator Account

After your organization's HHS Accelerator Account Administrator has activated his or her NYC.ID, s/he may begin the process of setting up your organization's HHS Accelerator Account.



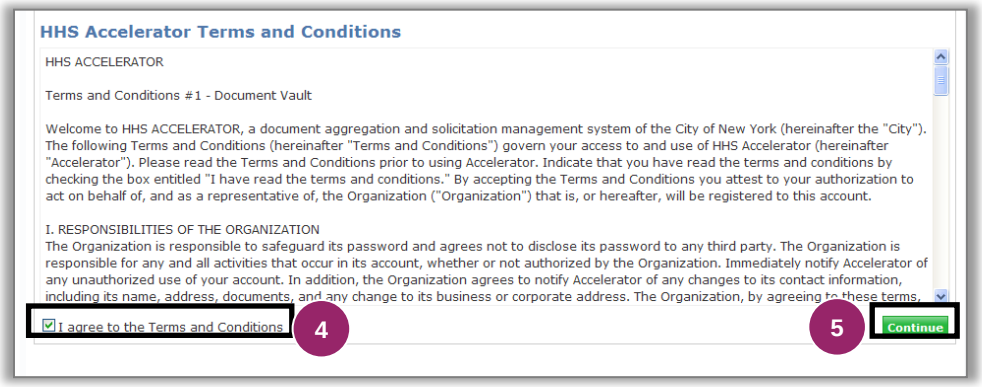
1. Enter your **"NYC.ID."**

Your NYC.ID is the email address used in your initial account request.

2. Enter your **"NYC.ID Password."**

3. Click **"Login."**

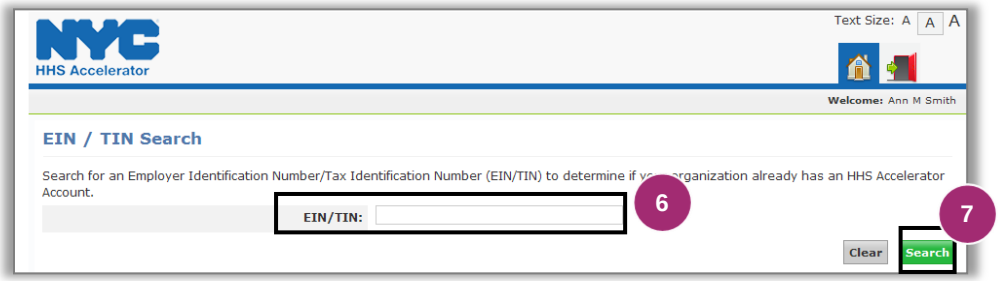
You will then be directed to review and accept the HHS Accelerator System Terms and Conditions.



Review the HHS Accelerator System Terms and Conditions.

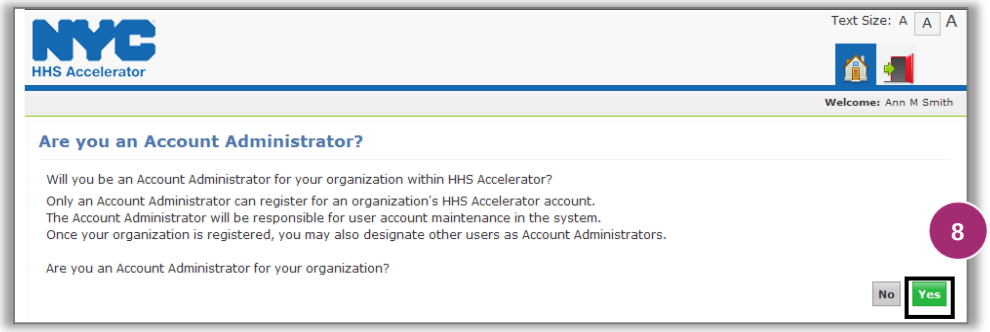
4. Click check box to agree to the Terms and Conditions.

5. Click **"Continue."**



6. Enter your organization's **Employer Identification Number** (EIN) or **Tax Identification Number** (TIN).

7. Click **"Search."**

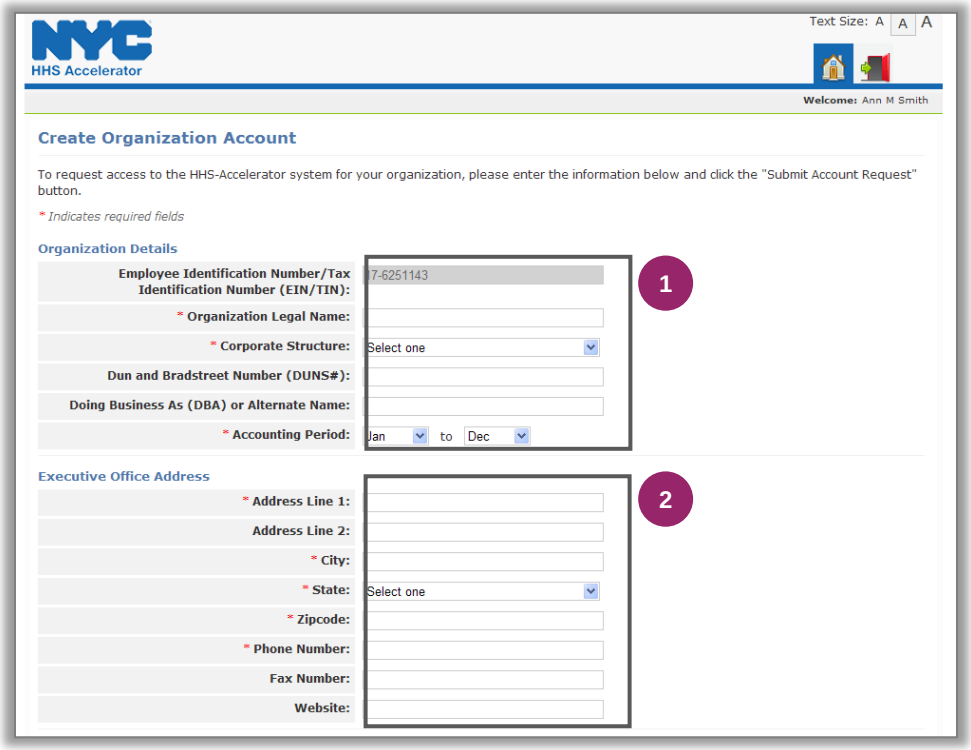


*If you are not authorized to apply as your organization's Account Administrator, click "**No**" and refer the appropriate individual from your organization to set up the account.*

8. If you are the Account Administrator, click **"Yes."**

Creating the Organization Account

To create the Organization Account:



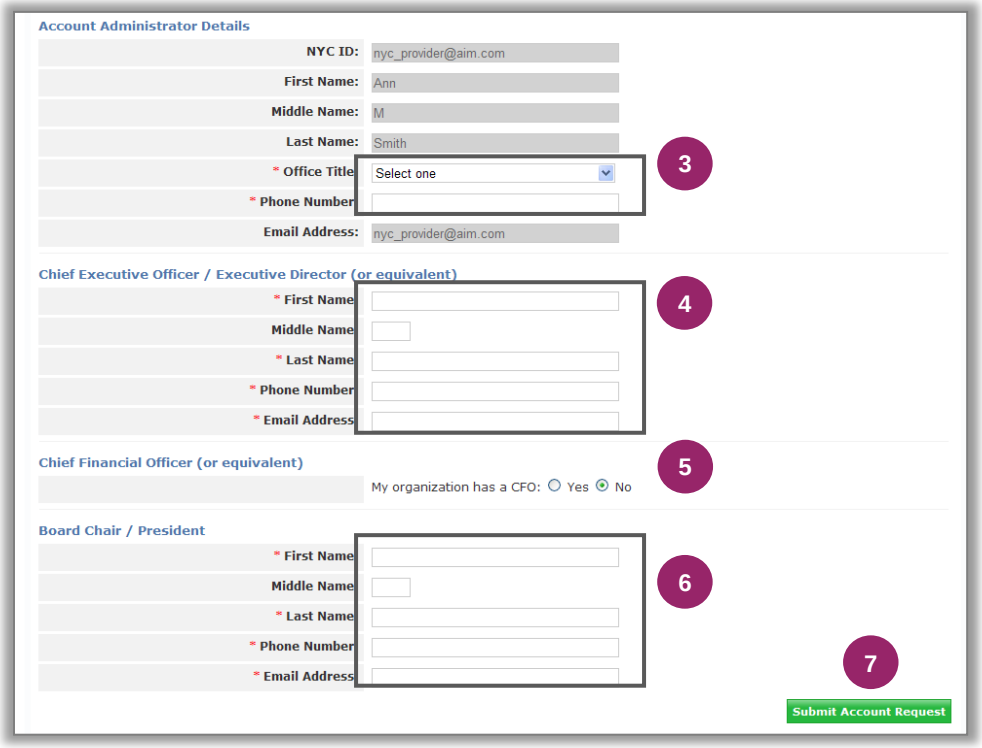
The fields marked by a red asterisk (*) are required.

1. Enter **"Organization Details."**

The EIN/TIN is prepopulated from the data entered in step 6 and is read-only.

2. Enter **"Executive Office Information."**

The Account Administrator's NYC.ID account data is prepopulated from Step 2 and is read-only.



3. Enter **"Office Title"** and **"Phone Number"** for the Account Administrator

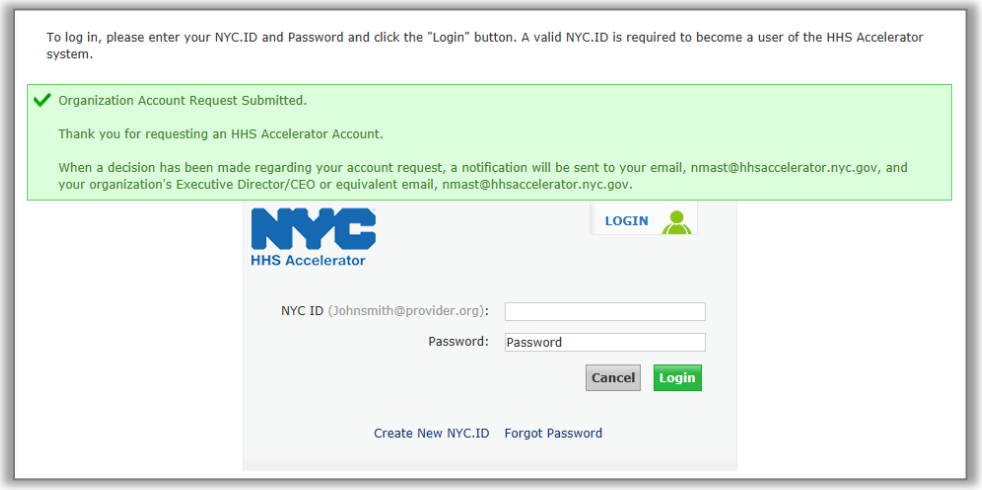
4. Enter **"Chief Executive Officer"** information.

5. Indicate whether your organization has a Chief Financial Officer (CFO).

6. Enter **"Board Chair"** information.

7. Click **"Submit Account Request."**

The system will assign your request to a member of the HHS Accelerator Team for further processing.



If your request is approved, you will receive a system-generated email containing a validation link.

If your request is not approved, a member of the HHS Accelerator Team will contact you for more information.

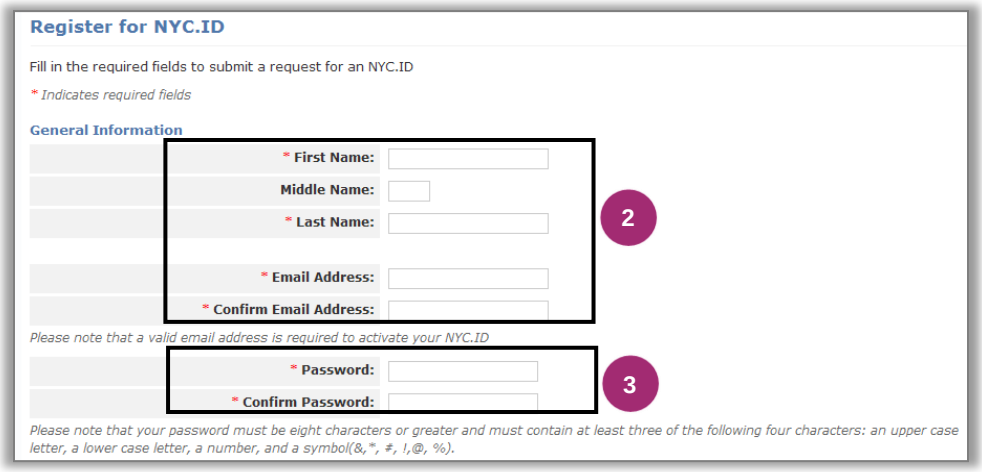
Accessing an Existing Account for New Users

Users requesting access to an existing account must follow the steps to create an NYC.ID. The Account Administer for your organization will then need to login and approve your request in the HHS Accelerator System.

Creating a New System User

1. Click the **"Create New NYC.ID"** link.

The fields marked by a red asterisk (*) are required.



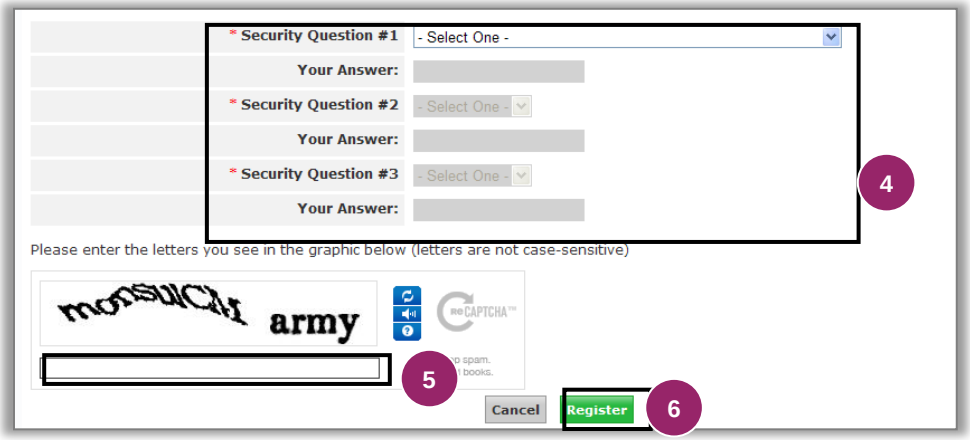
2. Enter required data to complete the registration form.

3. Create and confirm your **"NYC.ID Password."**

Passwords must be <u>at least</u> eight (8) characters long and contain (3) of the following:

- *An uppercase letter*
- *A lowercase letter*
- *A number*
- *One of these symbols (&*#!@%).*

Your first name, last name, email, or the word password are not allowed to be used.

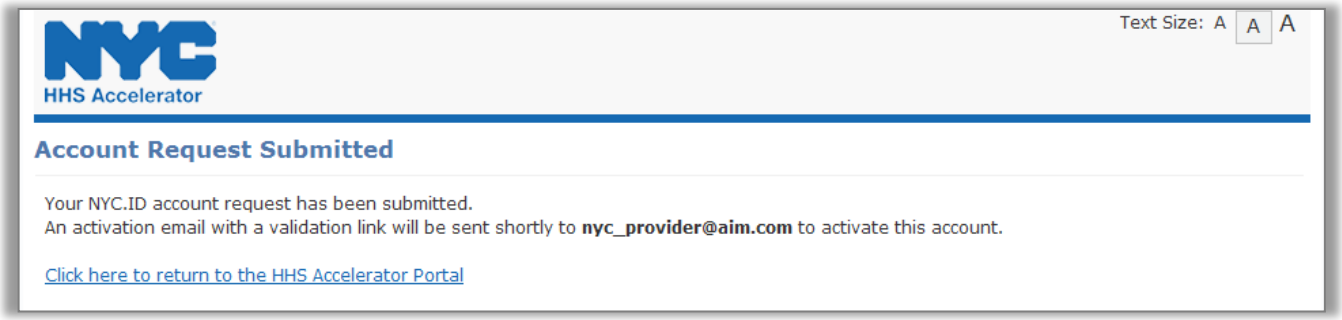


4. Select three security questions and provide your unique answers.

5. Enter the characters displayed in the CAPTCHA™ graphic.

6. Click **"Register"** to submit your request.

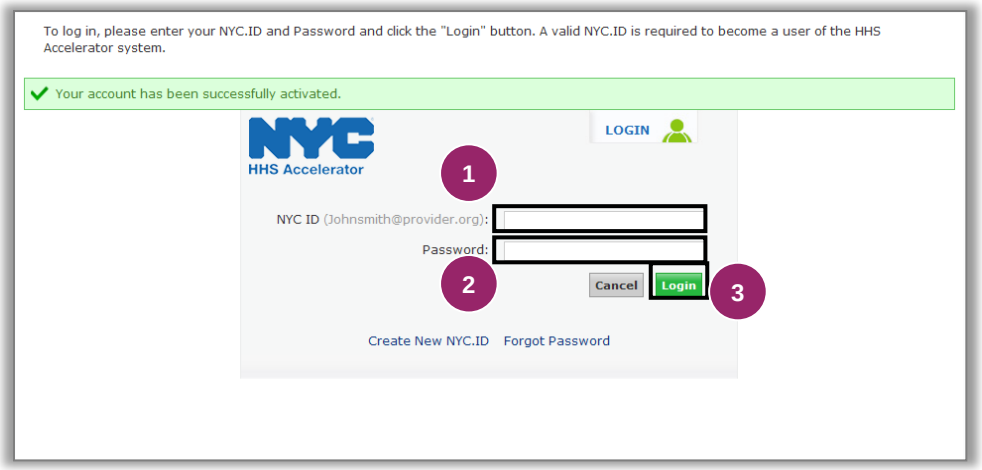
Once your request is successfully submitted, the system will direct you to the following screen:



Once successfully submitted, check your email inbox associated with your NYC.ID for an automated validation email. To activate your account, click the validation link within the email, which will direct you to the HHS Accelerator System login screen. The system will display confirmation of your NYC.ID activation.

Requesting Access to Your Organization's HHS Accelerator Account

Once the new user has activated their NYC.ID, s/he may begin the process of requesting access to your organization's HHS Accelerator Account.



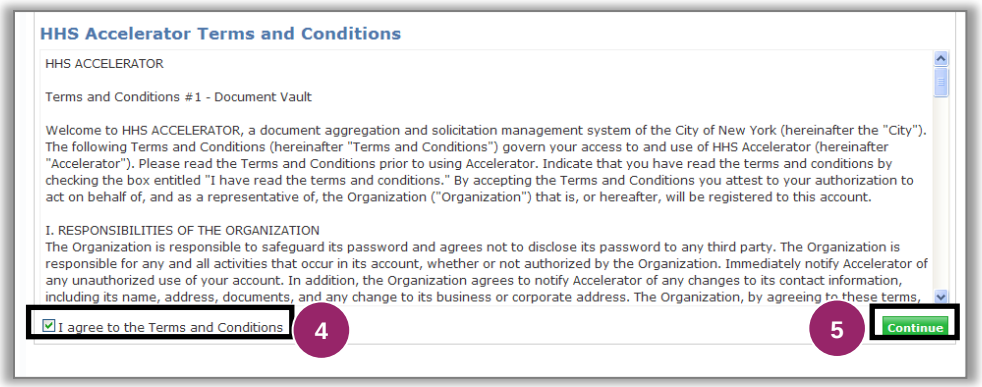
1. Enter your **"NYC.ID."**

Your NYC.ID is the email address used in your initial account request.

2. Enter your **"NYC.ID Password."**

3. Click **"Login."**

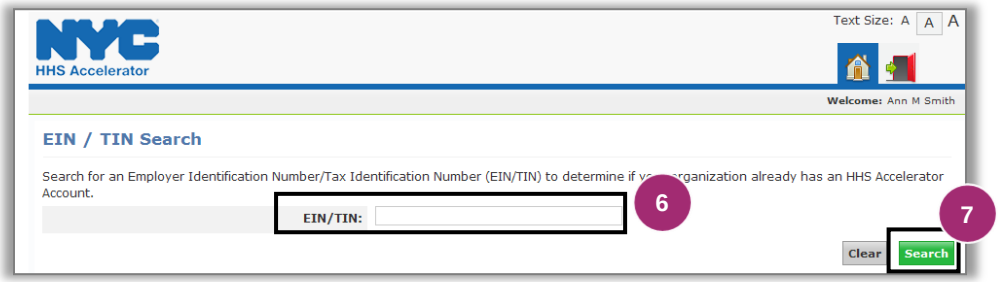
You will then be directed to review and accept the HHS Accelerator System Terms and Conditions.



Review the HHS Accelerator System Terms and Conditions.

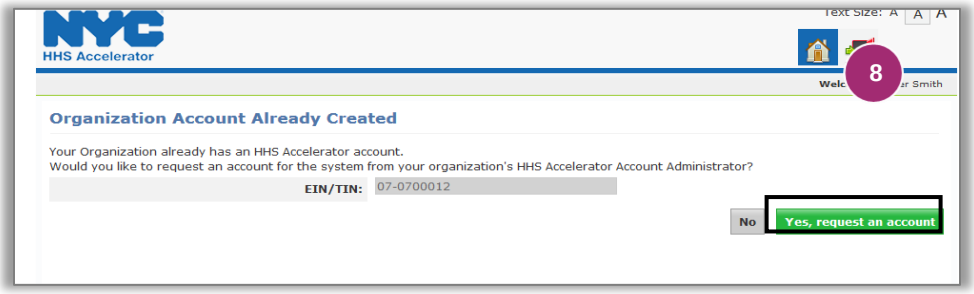
4. Click check box to agree to the Terms and Conditions.

5. Click **"Continue."**



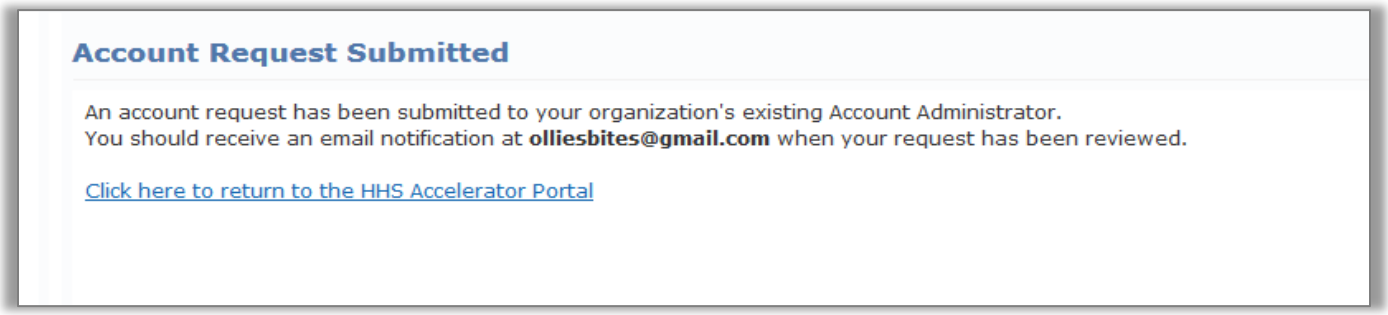
6. Enter your organization's **Employer Identification Number** (EIN) or **Tax Identification Number** (TIN).

7. Click **"Search."**



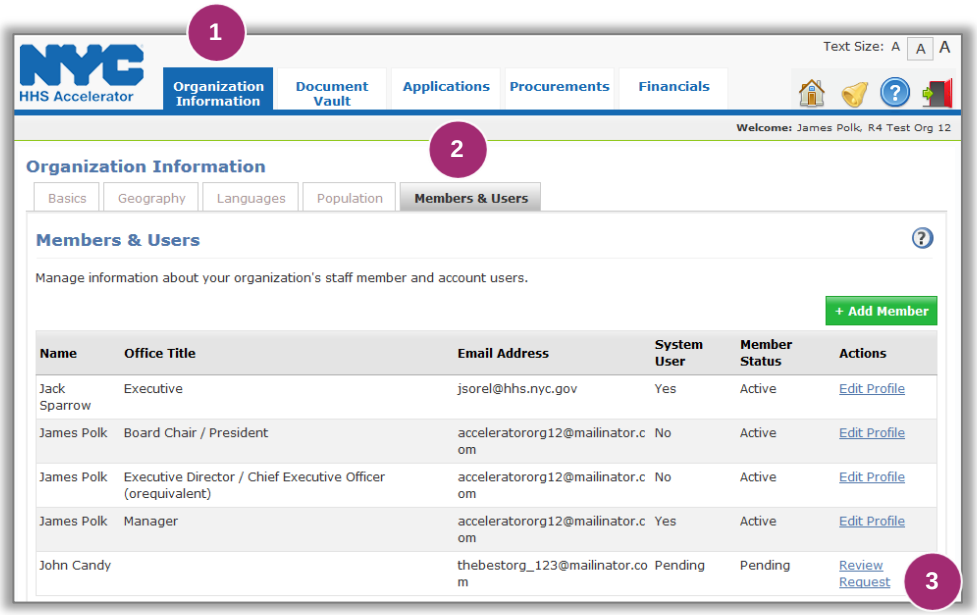
8. Click **"Yes, request an account."**

Once your request is submitted, the system will direct you to the following screen:



Once successfully submitted, check your email inbox associated with your NYC.ID for an automated validation email. To activate your account, click the validation link within the email, which will direct you to the HHS Accelerator System login screen. The system will display confirmation of your NYC.ID activation.

Once the new user has requested access to their organization, the Account Administrator will receive an email notification alerting them that a new user has requested access to the organization. The Account Administrator must then login to the system and approve the user request.



1. Click the **"Organization Information"** button.
2. Click the **"Members & Users"** tab.
3. Click the **"Review Request"** link.

Upon approving the request, the new user will receive an email alerting them that their user request has been approved and they can now access the system. For information on assigning user roles please review the Selecting Users and Assigning Roles section of this guide.

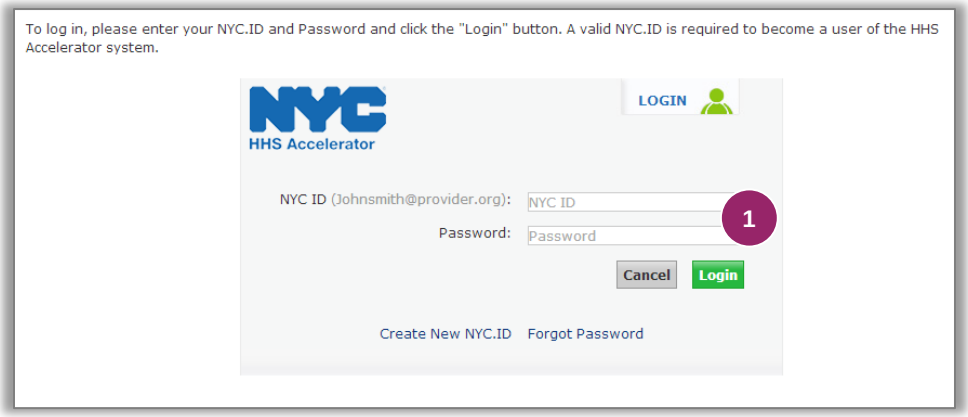
Managing Multiple Accounts by a Single User

Requesting Access to Multiple Accounts

Users who manage accounts for multiple organizations are able to access each organization's account through a single NYC.ID. To request access to additional organization's accounts please email the Helpdesk at info@hhsaccelerator.nyc.gov and include your name, NYC.ID, current organization and organization you wish to request access to.

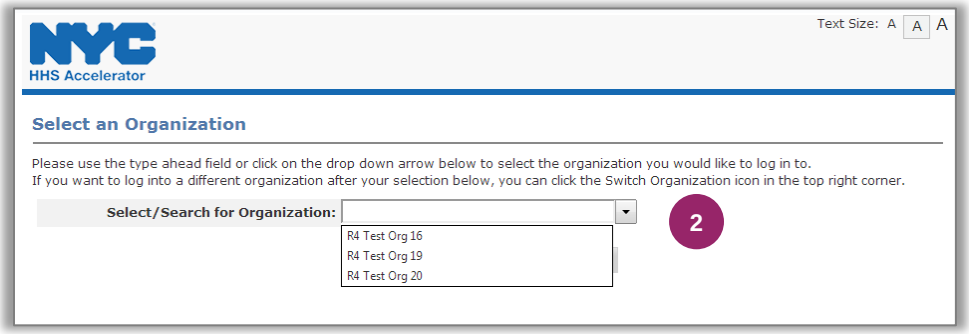
Selecting an Organization

Users who request access to additional accounts have the option to select which organization they would like to access after entering their login credentials.



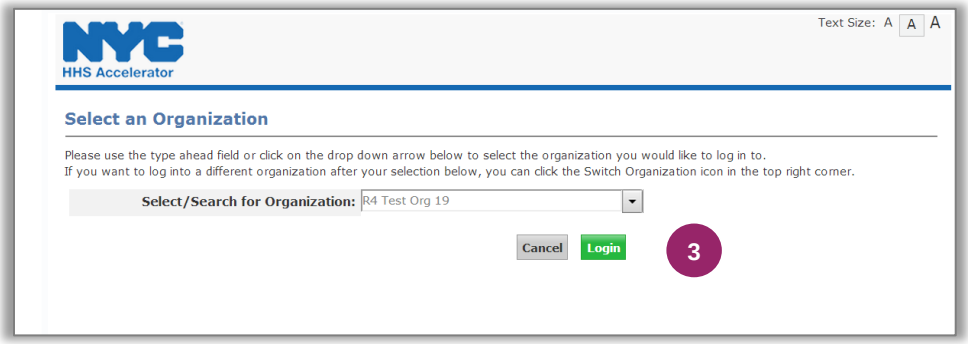
1. Enter your **"NYC.ID"** and **"Password"**

Your NYC.ID is the email address used in the initial account set up.



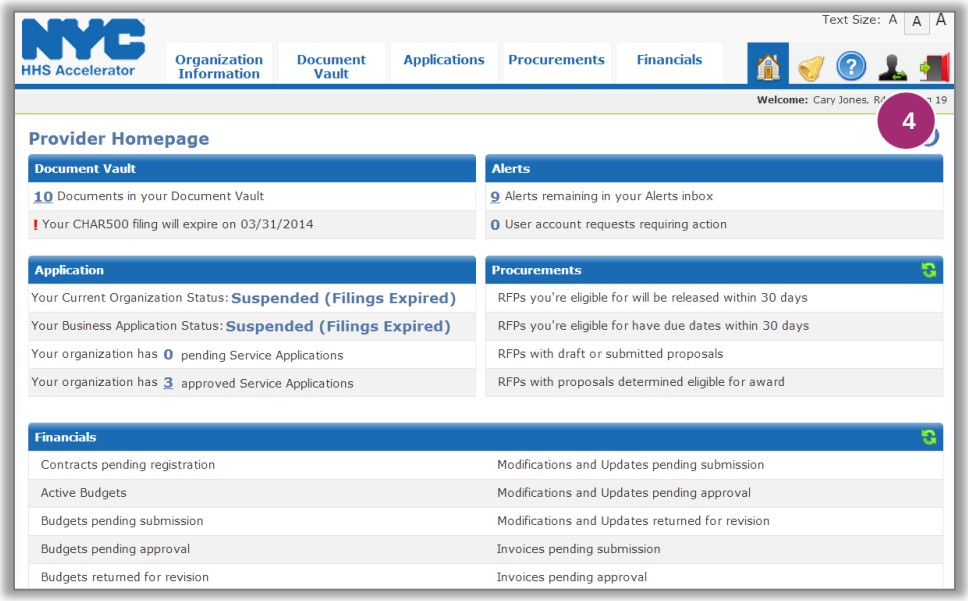
2. Select an organization from the **"Select/Search for Organization"** drop-down menu or start typing the name of the organization in the box.

If an organization does not appear in the drop down menu or when typed please contact info@hhsaccelerator.nyc.gov to request access.

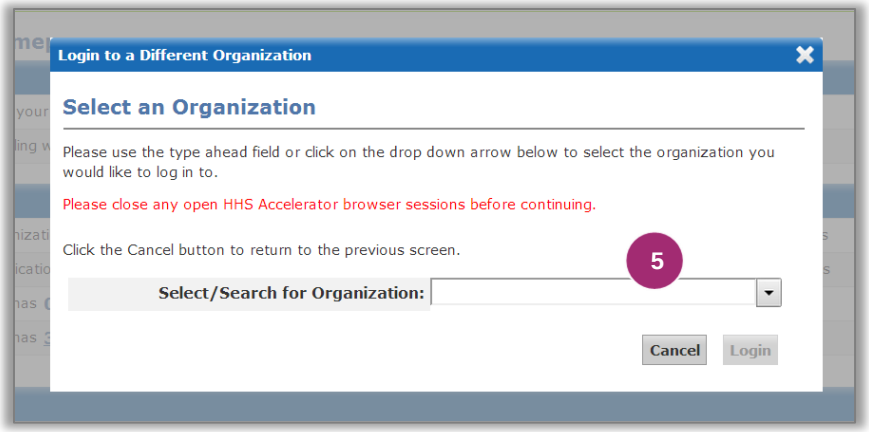


3. Click **"Login."**

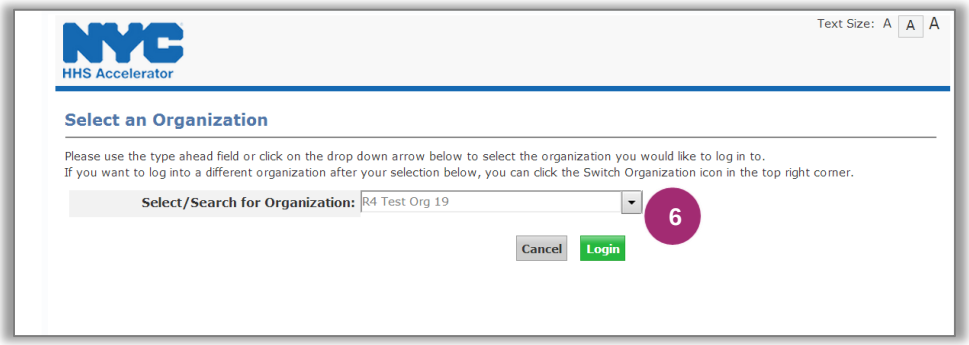
Once logged into the system, users can switch between organizations without completing logging out.



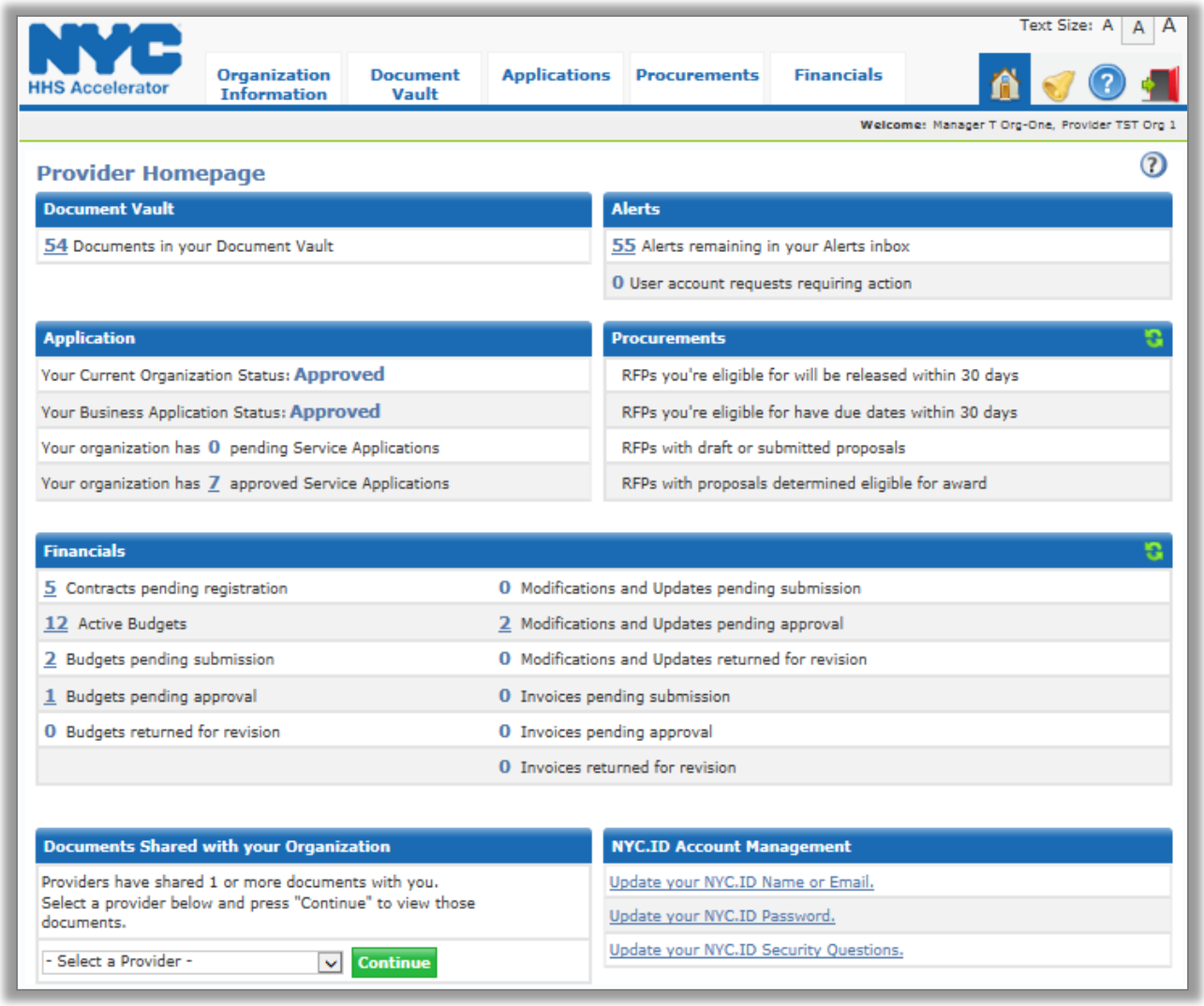
4. To switch accounts click the **"Switch User"** icon.



5. To switch users select an organization from the **"Select/Search for Organization"** drop down menu or start typing the name of the organization in the box.



6. Click **"Login."**

Provider Homepage

After logging in, the first page that you will encounter is the Provider Homepage. Below the main buttons and navigation icons is a dashboard that gives an overview of the Document Vault, Alerts, Application (status), Procurements, Financials, Documents Shared with your Organization and NYC.ID Account Maintenance.