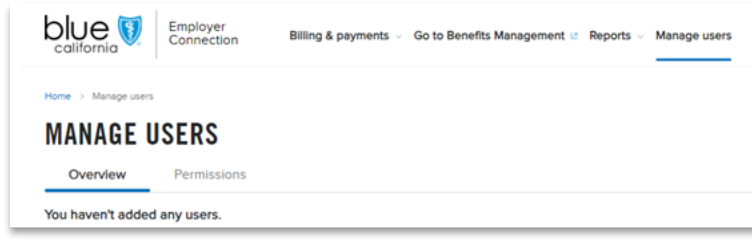


Manage users

Welcome to our guide for managing users. On the "Manage Users" page, Primary Contacts can seamlessly oversee Delegates within the system.

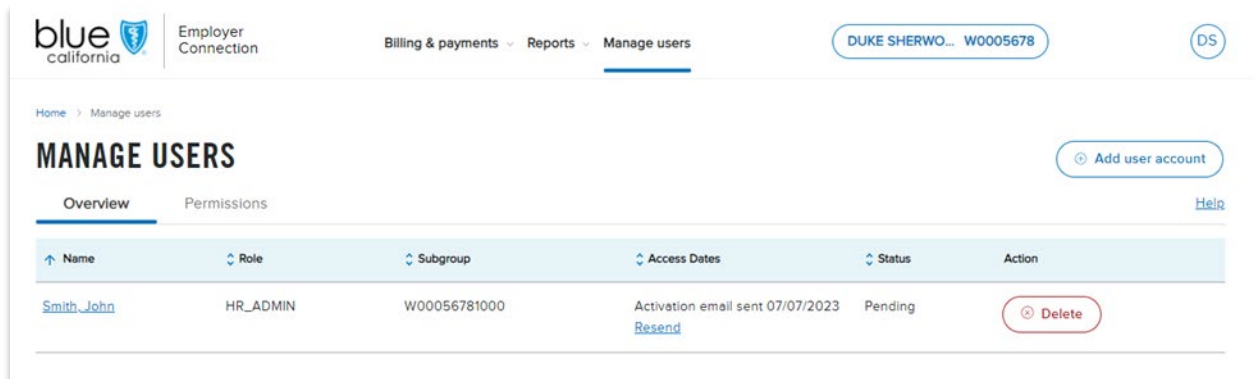


Delegate Visibility:

- Primary Contacts can access user management through the "Manage Users" section.
- There you can view a list of Delegate users. The list view becomes accessible when at least one delegate user is created.

Streamlined Navigation:

- The "Manage Users" section provides sub-navigation options: "Overview" and "Permissions."
- Primary Contacts can add new users by clicking the "Add user account."



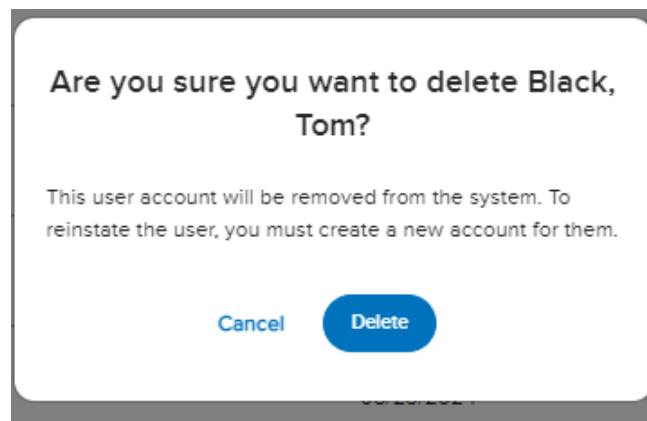
Comprehensive overview:

- The "Overview" tab displays users' roles, subgroup associations, access dates, status, and actions.
- The option to add user accounts and access the help window is conveniently located in the top right corner of the page.
- Sort fields like "Name," "Role," "Subgroup," "Access Dates," and "Status" for efficient organization.
- The "Action" field empowers Primary Contacts to delete users effectively.

Name	Role	Subgroup	Access Dates	Status	Action
Johnson, Jennifer	HR_ADMIN	W00675491000	12/06/2018 - 12/07/2019 Renew now	Active	Delete
RODRIGUES, SANDRA	HR_ADMIN	W00675491000	12/06/2018 - 12/07/2019 Renew now	Active	Delete

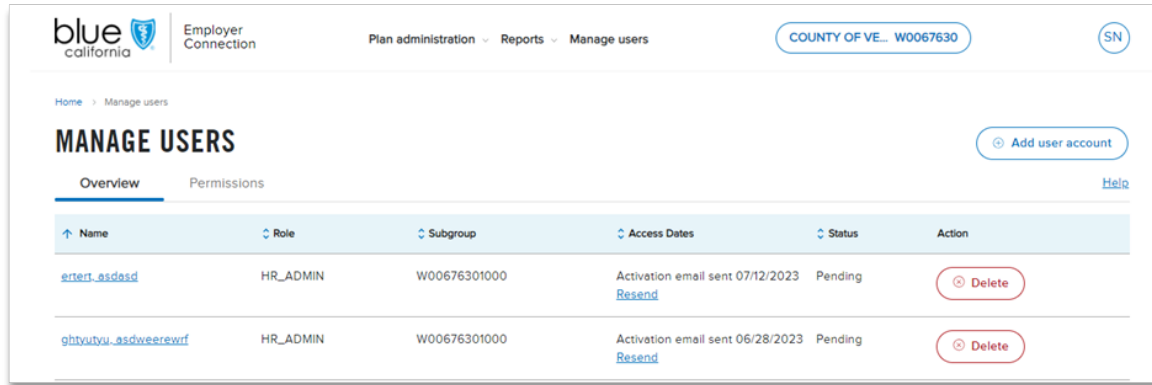
Deletion with confidence:

- Before the deletion of a user, a pop-up window will appear for final confirmation. If "Delete" is then selected, the user and their account access will be removed.



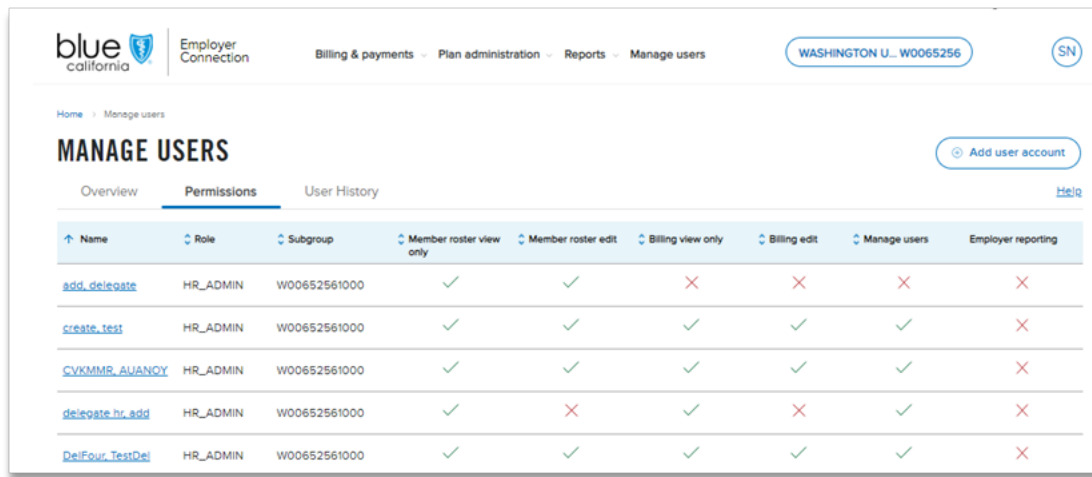
Efficient management features:

- Resend activation emails and facilitate renewal for expired access under the "Access Dates" header. When choosing to resend an activation email, a pop-up notification will confirm if the email was sent successfully.



In-depth permissions:

- The "Permissions" section lists users and their roles, subgroups, and access rights.



Adding new user accounts:

- Select "Add user account," input the necessary details. You can set permissions on a separate page.
- Customize permission sets based on subgroup requirements.
- Complete the check boxes and click "Create account" to generate login credentials.

The screenshot shows the 'ADD USER ACCOUNT' form in the blue california Employer Connection system. The form is titled 'ADD USER ACCOUNT' and is located under the 'Manage users' section. It includes a breadcrumb trail: 'Home > Manage users > Add user account'. The form is divided into two main sections: 'Personal Information' and 'Permissions by subgroup'. The 'Personal Information' section has a note 'All fields are required' and contains five input fields: 'First name', 'Last name', 'Phone', 'Email', and 'Confirm email'. The 'Permissions by subgroup' section is divided into two sub-sections: 'Billing, Members and Users' and 'Reporting'. The 'Billing, Members and Users' section has a table with columns for 'Subgroup', 'Member roster view only', 'Member roster edit', 'Billing view only', 'Billing edit', and 'Manage users'. The 'Reporting' section has a table with columns for 'Subgroup', 'Self-funded', 'Fully insured', and 'Fully insured (manual rates)'. Both tables have one row for the subgroup 'W0014217-1000'. At the bottom right of the form, there are 'Cancel' and 'Create account' buttons.

Subgroup	Member roster view only	Member roster edit	Billing view only	Billing edit	Manage users
W0014217-1000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Subgroup	Self-funded	Fully insured	Fully insured (manual rates)
W0014217-1000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

We hope this guide will help you in all your reporting needs. If you have any questions, please refer to this guide or contact [Employer Services](#) for assistance.