

# Broker website: Roles and permissions

Roles / Permission Sets → Screen / Menu ↓	Principal User (GA, Independent, TPA)	Admin User with Commission	Admin User without Commission	Agent / webuser	Billing User	Commissions User	Roster Mgt User	Enrollment User	Renewals User
Home	X	X	X	X	X	X	X	X	X
Create Quote	X	X	X	X				X	X
Book of Business	X	X	X	X	X	X	X	X	
List of Accounts	X	X	X	X	X	X	X	X	
Account Detail	X	X	X	X	X	X	X	X	
Add Member	X	X	X	X	X		X	X	
Billing	X	X	X	X	X	X	X		
Billing History	X	X	X	X	X	X	X		
Sub-Group/Plans	X	X	X	X	X	X	X	X	
Sub-Group/Plan Details	X	X	X	X	X	X	X	X	
Employees	X	X	X	X	X	X	X	X	
Employee/Dependent Detail	X	X	X	X	X	X	X	X	
Edit Member, Eligibility, QLE, PCP	X	X	X	X			X	X	
Documents (group-specific)	X	X	X	X	X	X	X	X	
Commissions	X	X				X			
List of Commissions	X	X				X			
Commissions Detail	X	X				X			
Agency Summary	X	X				X			
Client Summary	X	X				X			
Quotes	X	X	X	X				X	X
List of Quotes	X	X	X	X				X	X
Quote Details	X	X	X	X				X	X
Quote & Enroll	X	X	X	X				X	X
Applications	X	X	X	X				X	X
Renewals	X	X	X	X		X			X
List of Groups	X	X	X	X		X			X
Resources	X	X	X	X	X	X	X	X	X
Help and Support	X	X	X	X	X	X	X	X	X
Profile									
My Profile	X	X	X	X	X	X	X	X	X
Edit Profile	X	X	X	X	X	X	X	X	X
Manage Users (Related tab)	X	X							