Setting up roles and permissions

Quick Reference Guide

My Agency – Create Non-Principal Users

Step 1:	Login to the portal with username and password.
	  A. Click the User drop-down.
	  B. Click **My Agency**.

Step 2:	Broker Portal screen displays.
	  A. Click **DETAILS** tab to view broker account details.
	  B. Click **RELATED** tab to view and add new contacts.

 Step 3:	Click **New** to add a contact.

 Step 4:	A. Select **Broker.** B. Click **Next**.

![ConnectiCare logo]

Step 5:	**New Contact: Broker** screen displays.
	    A. Enter **Name**.
	    B. Enter **Email**.
	    C. Enter **Phone Number**.
	Scroll down to enter the other details.

Step 6:	A. Enter **Mailing Address** details. B. Click **Save**.

Step 7:	Click the contact you created. Click **Enable Partner User** from the drop-down to activate the user.

Step 8:	**Manage External User** pop-up displays. Make any required updates and click **Save**.

Step 9:	The details are saved. A welcome email will be sent to the newly added non-principal user.

Step 10:	Once a user is enabled as a partner, '**Disable Partner User**' becomes available as an option in the drop-down menu.

Step 11:	A confirmation popup screen appears. Click **Disable Partner User** to confirm deactivation.

My Agency – Create Non-Principal Users

Step 1:	Broker Portal screen displays. Click **RELATED** tab to view and add new contacts.

| Step 2: | Scroll down to Community Members.
Click **View All**.

Note: This member section displays the list of members from the Broker Community. |

| Step 3: | Click the **Filter** option to search and filter the list of users.

Click the drop-down to **Deactivate, Reset Password,** and **Manage Permissions.** |

![ConnectiCare logo]

Step 4:	A. Click the **Filter** icon to search and filter the list of users. B. Enter the filter criteria. Click **Apply** to display the filtered users.

Step 5:	Click the drop-down for the following options: • Activate or Deactivate • Reset Password • Manage Permissions

![ConnectiCare logo]

📝 **Step 6:**	From the drop-down, click **Deactivate**.

Accounts >   BROKER FOR CCI SG COMMERCAIL GROUP
Community Members
6 items • Updated a minute ago

	Full Name	⌄	Email	⌄	Active	⌄	
1	Dannette Matute		a_richards@connecticare.com		☑		▼
2	Barbara Perry		a_richards@connecticare.com		☑		▼
3	Alisa Weinberger		a_richards@connecticare.com		☑		▼
4	Adrian Forbes		a_richards@connecticare.com		☑		Deactivate
5	Allison Richards		a_richards@connecticare.com		☑		Reset Password
6	Troy Guillotte		a_richards@connecticare.com		☑		Manage Permissions

📝 **Step 7:**	A Confirmation Screen displays. Click **Deactivate** to confirm deactivation. A confirmation message displays after deactivation.

Accounts >   BROKER FOR CCI SG COMMERCAIL GROUP
Community Members
6 items • Updated 2 minutes ago   ✕

Full Name

1 Dannette Matute
2 Barbara Perry
3 Alisa Weinberger
4 Adrian Forbes
5 Allison Richards
6 Troy Guillotte

Deactivate Member?

Deactivated members can't login or reset their passwords. You can activate this member at any time.

Cancel   **Deactivate**

Step 8:	To activate an inactive/deactivated user:
	    A. Click the drop-down.
	    B. Click **Activate.**
	
	A confirmation message displays after activation.

Accounts >   BROKER FOR CCI SG COMMERCAIL GROUP
Community Members
6 items • Updated a few seconds ago

	Full Name	Email	Active	
1	Dannette Matute	a_richards@connecticare.com	☑	▾
2	Barbara Perry	a_richards@connecticare.com	☐	▾ Ⓐ
3	Alisa Weinberger	a_richards@connecticare.com	☑	Ⓑ Activate
4	Adrian Forbes	a_richards@connecticare.com	☑	▾
5	Allison Richards	a_richards@connecticare.com	☑	▾
6	Troy Guillotte	a_richards@connecticare.com	☑	▾

Step 9:	Click **Reset Password** from the drop-down.

Accounts >   BROKER FOR CCI SG COMMERCAIL GROUP
Community Members
6 items • Updated 2 minutes ago

	Full Name	Email	Active	
1	Dannette Matute	a_richards@connecticare.com	☑	▾
2	Barbara Perry	a_richards@connecticare.com	☑	▾
3	Alisa Weinberger	a_richards@connecticare.com	☑	▾
4	Adrian Forbes	a_richards@connecticare.com	☑	Deactivate
5	Allison Richards	a_richards@connecticare.com	☑	Reset Password
6	Troy Guillotte	a_richards@connecticare.com	☑	Manage Permissions

Step 10:	A Confirmation Screen displays. Click **Reset Password** to confirm. A confirmation message displays after password is reset.
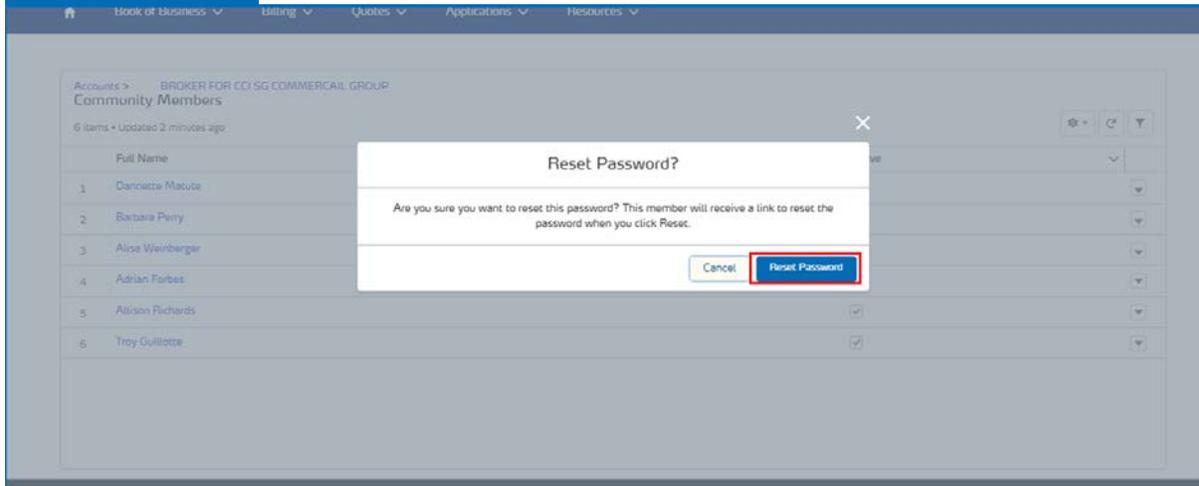
Step 11:	Click **Manage Permissions** from the drop-down.
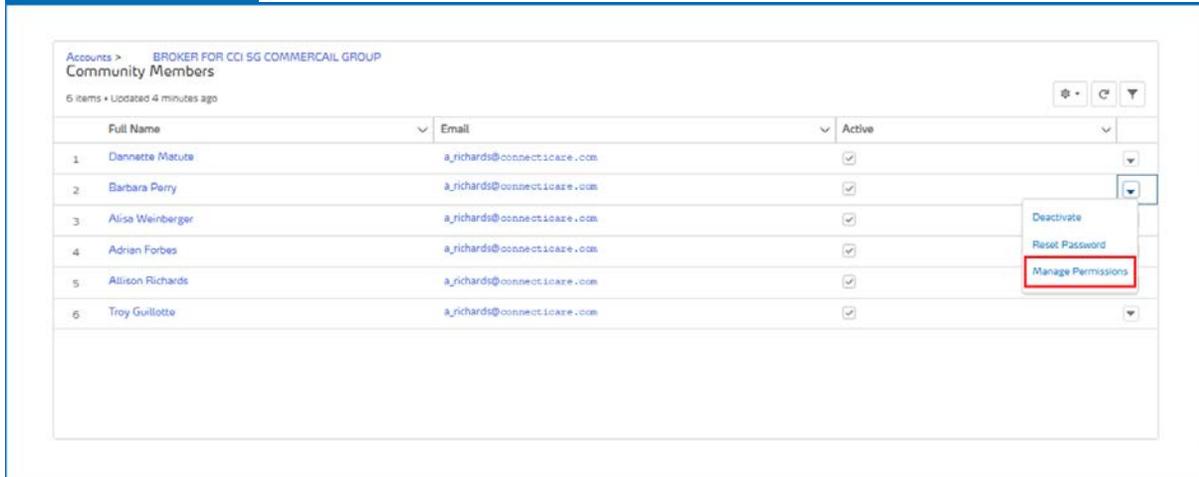
Step 12:	The **Manage Permissions** dialog box displays.
	    A. Select the Permission you wish to assign to the user.
	    B. Click the arrow to move it to the **Selected** box.

Step 13:	A. The permission set will be moved from the available to selected list. B. Click **Save** to confirm the updated permissions.

							The permission set matrix for different types of users are available. Permission will be set based on each user role.
Step 14:							Different profiles and associated access are available based on the user's role/hierarchy in the organization.

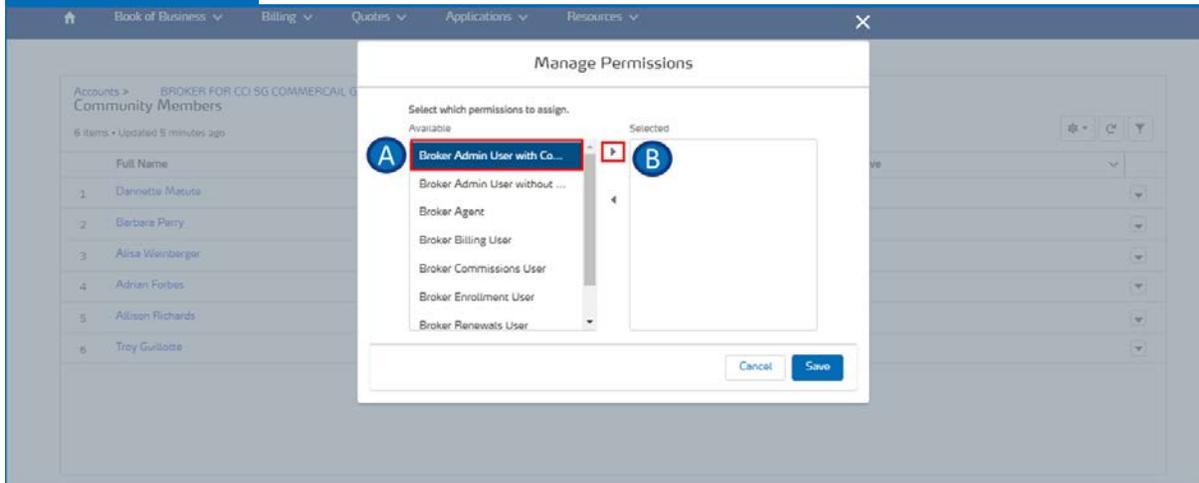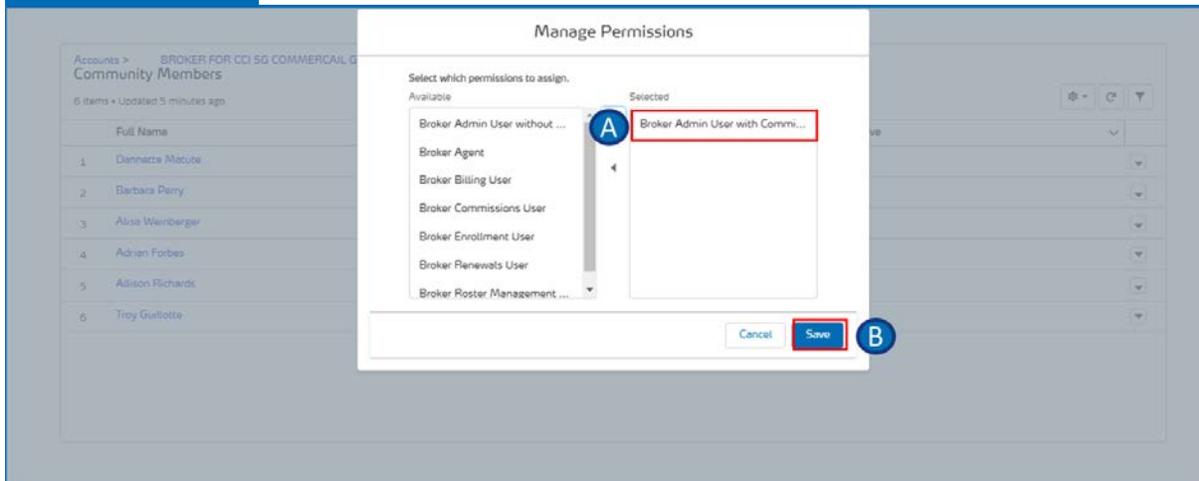| Roles / Permission Sets → Screen / Menu ↓	Principal User (GA, Independent, TPA)	Admin User with Comission	Admin User without Comission	Agent	Billing User	Commissions User	Roster Mgt User	Enrollment User	Renewals User
Label in Salesforce	Broker Principal User	Broker Admin User with Commission	Broker Admin User without Commission	Broker Agent	Broker Billing User	Broker Commissions User	Broker Roster Management User	Broker Enrollment User	Broker Renewals User
API name in Salesforce	Broker_Principal_User	Broker_Admin_User_with_Commission	Broker_Admin_User_without_Commission	Broker_Agent	Broker_Billing_User	Broker_Commissions_User	Broker_Roster_Management_User	Broker_Enrollment_User	Broker_Renewals_User
Home	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	
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
List of Documents (All Lines of Business)	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							

Thank You