

Setting up roles and permissions

Quick Reference Guide

Connecti

My Agency – Create Non-Principal Users



Step 1:

- Login to the portal with username and password.
- Click the User drop-down.
 - Click **My Agency**.



Step 2:

- Broker Portal screen displays.
- Click **DETAILS** tab to view broker account details.
 - Click **RELATED** tab to view and add new contacts.

License #	Status	Licensed State	Effective Date	Expiration Date
001006763	Active	CT	Jul 31, 2020	Jan 30, 2022
LA-857680	Active	NY	Jun 30, 2017	Jun 29, 2021



Step 3:

Click **New** to add a contact.

Account: **BROKER FOR CCI SG COMMERCIAL GROUP**

Email: a.richards@connecticare.com Phone: 616-264-5921 Address: 175 CITY TOWER, FARMINGTON, CT 06034, HARTFORD COUNTY

DETAILS RELATED

Contacts (6) New

Name	Account Name	Phone
Dannette Masute	BROKER FOR CCI SG COMM...	616-264-5921
Alicia Weinberger	BROKER FOR CCI SG COMM...	616-264-5921
Adrian Forbes	BROKER FOR CCI SG COMM...	616-264-5921
Barbara Perry	BROKER FOR CCI SG COMM...	616-264-5921
Allison Richards	BROKER FOR CCI SG COMM...	616-264-5921
Troy Guillotte	BROKER FOR CCI SG COMM...	(463) 773-3737



Step 4:

- A. Select **Broker**.
- B. Click **Next**.

Book of Business Commissions Billing Quotes Applications Resources

DETAILS RELATED

Contacts (1)

Name	Contact Type
Robert Planes CCI	Web User / Broker Staff

Community Members (3)

Full Name	Email
HP PLANNING, LLC SIVA EH - AI	sivakumar.k5@cognizant.com
Robert Planes CCI	mauricio@attanosconsulting.com
Robert Houghton	sivakumar.k5@cognizant.com

New Contact

Select a record type

- Broker A Select record type for creating broker contact
- Customer Contact
- Single Person/Household Individual/Medicare Contact Record

Cancel Next B



Step 5:

New Contact: Broker screen displays.

- A. Enter **Name**.
- B. Enter **Email**.
- C. Enter **Phone Number**.

Scroll down to enter the other details.

The screenshot shows the 'New Contact: Broker' form. The 'Contact Information' section is visible, containing the following fields: Account Name (HP PLANNING, LLC SIVA EH - AG - CCI), Title, Contact Owner (HP PLANNING, LLC SIVA EH - AG - CCI), Contact Type (dropdown menu), Contact Record Type (Broker), * Email, * Phone, * Name, Salutation (dropdown menu), First Name, Middle Name, and * Last Name. At the bottom right, there are buttons for 'Cancel', 'Save & New', and 'Save'.



Step 6:

A. Enter **Mailing Address** details.

B. Click **Save**.

The screenshot shows the 'New Contact: Broker' form with the 'Mailing Address' section highlighted by a red box. This section includes fields for Mailing Street, Mailing City, Mailing State/Province, Mailing Zip/Postal Code, and Mailing Country. A blue circle with the letter 'A' is placed to the left of the Mailing Address section. At the bottom right, the 'Save' button is highlighted with a red box, and a blue circle with the letter 'B' is placed next to it. The 'Save & New' and 'Cancel' buttons are also visible.



Step 7:

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

Contact
Mr. John Smith

Phone (888) 888-8888 Email john.smith@gmail.com Account Name BROKER FOR CCI SG COMMERCIAL GROUP Mailing Address 100 Main Street Hartford, CT 06134

Buttons: Edit Clone **Enable Partner User**

▼ Contact Information

Account Name: BROKER FOR CCI SG COMMERCIAL GROUP

Contact Owner: Troy Guillotte

Contact Record Type: Broker

Name: Mr. John Smith

Created By: Troy Guillotte, 8/5/2020 12:16 PM

Title:

Email: john.smith@gmail.com

Phone: (888) 888-8888

Mailing Address: 100 Main Street Hartford, CT 06134

Last Modified By: Troy Guillotte, 8/5/2020 12:16 PM



Step 8:

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

Book of Business ▼ Biller ▼ Quotes ▼ Applications ▼ Resources ▼

Manage External User Save Cancel

User Information

Username: john.smith@gmail.com Email Encoding: General US & Western Europe (ISO-8859-1, ISO-LATIN-1)

Time Zone: (GMT-04:00) Eastern Daylight Time (America/New_York) Role: CBIA BROKER FOR CCI SG COMMERCIAL GROUP Partner User

Locale: English (United States) User License: Partner Community Login

Language: English Profile: --None--

Alias: jsmit Active:

Nickname: john.smith Generate new password and notify user immediately:

Contact Information

First Name: John Email: john.smith@gmail.com

Middle Name: Phone: 8888888888

Last Name: Smith Extension:

Suffix: Fax:

Title: Mobile:

Start of Day:

End of Day:

Address Information

Hartford, CT 06134

Created By: Troy Guillotte, 8/5/2020 12:16 PM Last Modified By: Troy Guillotte, 8/5/2020 12:16 PM



Step 9:

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

Contact
Mr. John Smith

[Edit](#) [Clone](#) [Disable Partner User](#)

Phone (888) 888-8888	Email john.smith@gmail.com	Account Name <u>BROKER FOR CCI SG COMMERCIAL GROUP</u>	Mailing Address 100 Main Street Hartford, CT 06134
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▼ Contact Information

Account Name <u>BROKER FOR CCI SG COMMERCIAL GROUP</u>	Title
Contact Owner <u>Troy Guillotte</u>	Email john.smith@gmail.com
Contact Record Type Broker	Phone (888) 888-8888
Name Mr. John Smith	Mailing Address 100 Main Street Hartford, CT 06134
Created By <u>Troy Guillotte, 8/5/2020 12:16 PM</u>	Last Modified By <u>Troy Guillotte, 8/5/2020 12:16 PM</u>



Step 10:

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

Contact
Mr. John Smith

[Edit](#) [Clone](#) [Disable Partner User](#)

Phone (888) 888-8888	Email john.smith@gmail.com	Account Name <u>BROKER FOR CCI SG COMMERCIAL GROUP</u>	Mailing Address 100 Main Street Hartford, CT 06134
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▼ Contact Information

Account Name <u>BROKER FOR CCI SG COMMERCIAL GROUP</u>	Title
Contact Owner <u>Troy Guillotte</u>	Email john.smith@gmail.com
Contact Record Type Broker	Phone (888) 888-8888
Name Mr. John Smith	Mailing Address 100 Main Street Hartford, CT 06134
Created By <u>Troy Guillotte, 8/5/2020 12:16 PM</u>	Last Modified By <u>Troy Guillotte, 8/5/2020 12:16 PM</u>



Step 11:

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

The screenshot shows a user profile for Mr. John Smith. A modal window titled "Disable Partner User" is open in the center. The modal contains the following text: "Disabling external users is permanent. They lose access to any portals or communities, and are removed from all groups, teams, and sharing rules with which they were associated. If you re-enable this contact for external access, the new external user that is created won't be associated with the previous external user. Are you sure?". At the bottom of the modal, there are two buttons: "Cancel" and "Disable Partner User", with the latter button highlighted by a red box. In the background, the user profile page is visible, showing contact information and a "Disable Partner User" button in the top right corner.

My Agency – Create Non-Principal Users



Step 1:

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

The screenshot displays the "My Agency" Broker Portal for the account "BROKER FOR CCI SG COMMERCIAL GROUP". The account details include: Email (a_richards@connecticare.com), Phone (616-264-5921), and Address (175 CITY TOWER, FARMINGTON, CT 06034, HARTFORD COUNTY). Below the details, there are two tabs: "DETAILS" and "RELATED", with the "RELATED" tab highlighted by a red box. The "RELATED" tab shows a list of account owners, including Allison Sherene Richards, with their respective contact information and license status.



Step 2:

Scroll down to Community Members.
Click **View All**.

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

Adrian Forbes	BROKER FOR CCI SG COMM...	616-264-5921	▼
Barbara Perry	BROKER FOR CCI SG COMM...	616-264-5921	▼
Allison Richards	BROKER FOR CCI SG COMM...	616-264-5921	▼
Troy Guillotte	BROKER FOR CCI SG COMM...	(463) 773-3737	▼
View All			

Community Members (6)		
Full Name	Email	Active
Danette Macute	a_richards@connecticare.com	<input checked="" type="checkbox"/>
Barbara Perry	a_richards@connecticare.com	<input checked="" type="checkbox"/>
Alisa Weinberger	a_richards@connecticare.com	<input checked="" type="checkbox"/>
Adrian Forbes	a_richards@connecticare.com	<input checked="" type="checkbox"/>
Allison Richards	a_richards@connecticare.com	<input checked="" type="checkbox"/>
Troy Guillotte	a_richards@connecticare.com	<input checked="" type="checkbox"/>
View All		



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**.

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

Full Name	Email	Active	
1 Danette Macute	a_richards@connecticare.com	<input checked="" type="checkbox"/>	▼
2 Barbara Perry	a_richards@connecticare.com	<input checked="" type="checkbox"/>	▼
3 Alisa Weinberger	a_richards@connecticare.com	<input checked="" type="checkbox"/>	▼
4 Adrian Forbes	a_richards@connecticare.com	<input checked="" type="checkbox"/>	▼
5 Allison Richards	a_richards@connecticare.com	<input checked="" type="checkbox"/>	▼
6 Troy Guillotte	a_richards@connecticare.com	<input checked="" type="checkbox"/>	▼

Deactivate
 Reset Password
 Manage Permissions



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.

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

	Full Name	Email	Active	
1	Dannette Matute	a_richards@connecticare.com	<input checked="" type="checkbox"/>	
2	Barbara Perry	a_richards@connecticare.com	<input checked="" type="checkbox"/>	
3	Alisa Weinberger	a_richards@connecticare.com	<input checked="" type="checkbox"/>	
4	Adrian Forbes	a_richards@connecticare.com	<input checked="" type="checkbox"/>	
5	Allison Richards	a_richards@connecticare.com	<input checked="" type="checkbox"/>	
6	Troy Guillotte	a_richards@connecticare.com	<input checked="" type="checkbox"/>	

Quick Filters

Full Name

Email

Active

Checked

Not Checked



Step 5:

Click the drop-down for the following options:

- Activate or Deactivate
- Reset Password
- Manage Permissions

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

	Full Name	Email	Active	
1	Dannette Matute	a_richards@connecticare.com	<input checked="" type="checkbox"/>	
2	Barbara Perry	a_richards@connecticare.com	<input checked="" type="checkbox"/>	
3	Alisa Weinberger	a_richards@connecticare.com	<input checked="" type="checkbox"/>	
4	Adrian Forbes	a_richards@connecticare.com	<input checked="" type="checkbox"/>	
5	Allison Richards	a_richards@connecticare.com	<input checked="" type="checkbox"/>	
6	Troy Guillotte	a_richards@connecticare.com	<input checked="" type="checkbox"/>	

Deactivate

Reset Password

Manage Permissions



Step 6:

From the drop-down, click **Deactivate**.

Accounts > BROKER FOR CCI 5G COMMERCIAL GROUP
Community Members
 6 items • Updated a minute ago

	Full Name	Email	Active	
1	Dannette Matute	a_richards@connecticare.com	<input checked="" type="checkbox"/>	▼
2	Barbara Perry	a_richards@connecticare.com	<input checked="" type="checkbox"/>	▼
3	Aisa Weinberger	a_richards@connecticare.com	<input checked="" type="checkbox"/>	▼
4	Adrian Forbes	a_richards@connecticare.com	<input checked="" type="checkbox"/>	▼
5	Allison Richards	a_richards@connecticare.com	<input checked="" type="checkbox"/>	▼
6	Troy Guillotte	a_richards@connecticare.com	<input checked="" type="checkbox"/>	▼

Dropdown menu options: Deactivate, Reset Password, Manage Permissions



Step 7:

A Confirmation Screen displays.
 Click **Deactivate** to confirm deactivation.
 A confirmation message displays after deactivation.

Accounts > BROKER FOR CCI 5G COMMERCIAL GROUP
Community Members
 6 items • Updated 2 minutes ago

	Full Name	Email	Active	
1	Dannette Matute	a_richards@connecticare.com	<input checked="" type="checkbox"/>	▼
2	Barbara Perry	a_richards@connecticare.com	<input checked="" type="checkbox"/>	▼
3	Aisa Weinberger	a_richards@connecticare.com	<input checked="" type="checkbox"/>	▼
4	Adrian Forbes	a_richards@connecticare.com	<input checked="" type="checkbox"/>	▼
5	Allison Richards	a_richards@connecticare.com	<input checked="" type="checkbox"/>	▼
6	Troy Guillotte	a_richards@connecticare.com	<input checked="" type="checkbox"/>	▼

Deactivate Member?

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



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 COMMERCIAL GROUP
Community Members
6 items • Updated a few seconds ago

	Full Name	Email	Active	
1	Dannette Macute	a_richards@connecticare.com	<input checked="" type="checkbox"/>	▼
2	Barbara Perry	a_richards@connecticare.com	<input type="checkbox"/>	▼
3	Alisa Weinberger	a_richards@connecticare.com	<input checked="" type="checkbox"/>	▼
4	Adrian Forbes	a_richards@connecticare.com	<input checked="" type="checkbox"/>	▼
5	Allison Richards	a_richards@connecticare.com	<input checked="" type="checkbox"/>	▼
6	Troy Guillotte	a_richards@connecticare.com	<input checked="" type="checkbox"/>	▼

Note: In the original image, a red box highlights the 'Activate' option in the dropdown menu for the second row (Barbara Perry), with callout 'B'. A blue circle with 'A' is next to the dropdown arrow.



Step 9:

Click **Reset Password** from the drop-down.

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

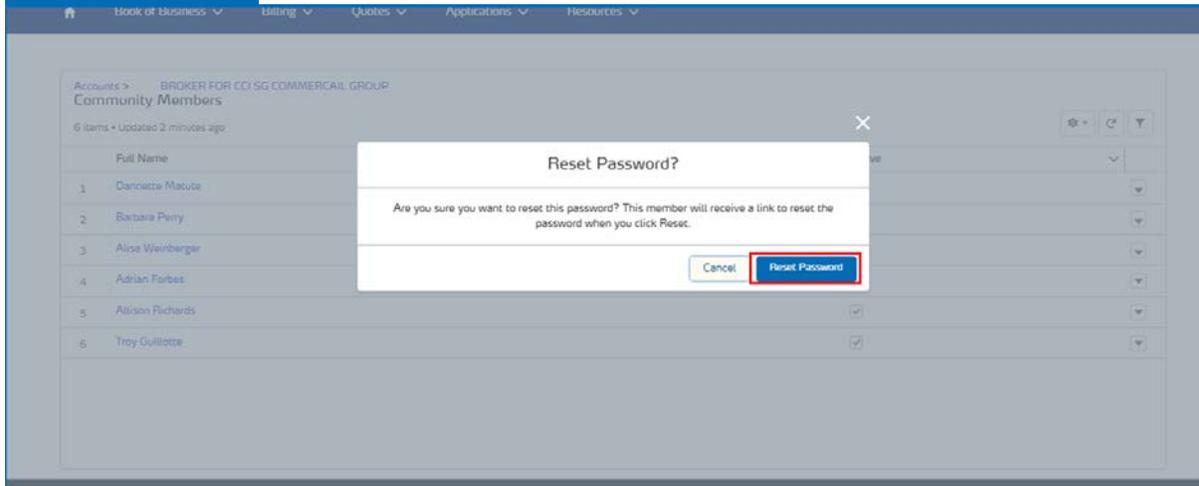
	Full Name	Email	Active	
1	Dannette Macute	a_richards@connecticare.com	<input checked="" type="checkbox"/>	▼
2	Barbara Perry	a_richards@connecticare.com	<input checked="" type="checkbox"/>	▼
3	Alisa Weinberger	a_richards@connecticare.com	<input checked="" type="checkbox"/>	▼
4	Adrian Forbes	a_richards@connecticare.com	<input checked="" type="checkbox"/>	▼
5	Allison Richards	a_richards@connecticare.com	<input checked="" type="checkbox"/>	▼
6	Troy Guillotte	a_richards@connecticare.com	<input checked="" type="checkbox"/>	▼

Note: In the original image, a red box highlights the 'Reset Password' option in the dropdown menu for the third row (Alisa Weinberger).



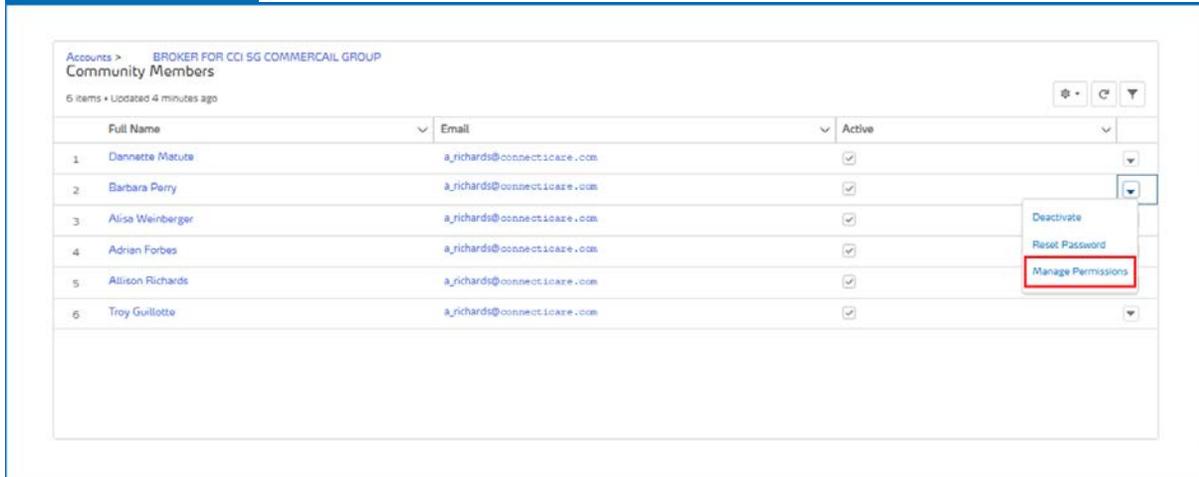
Step 10:

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.

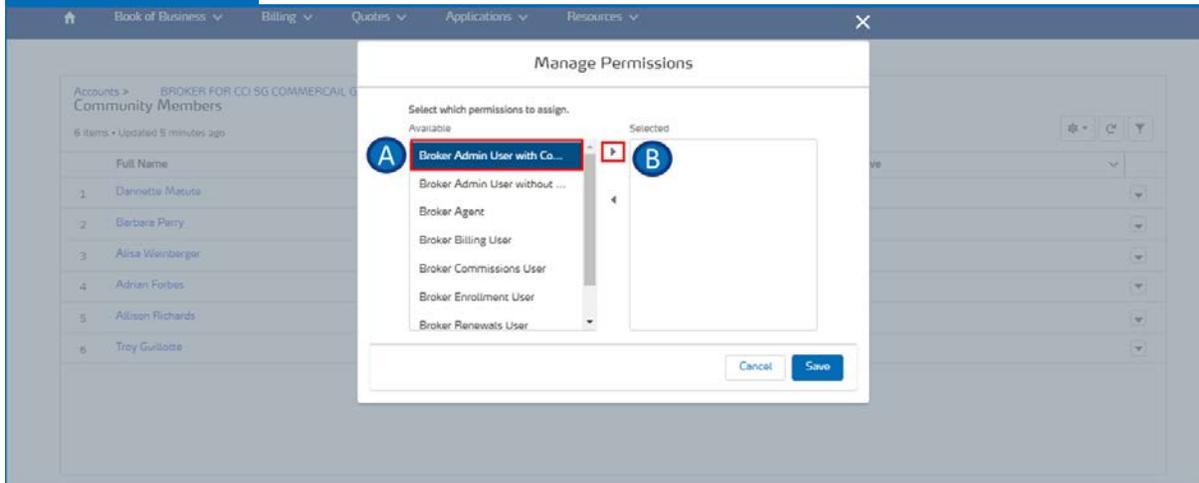




Step 12:

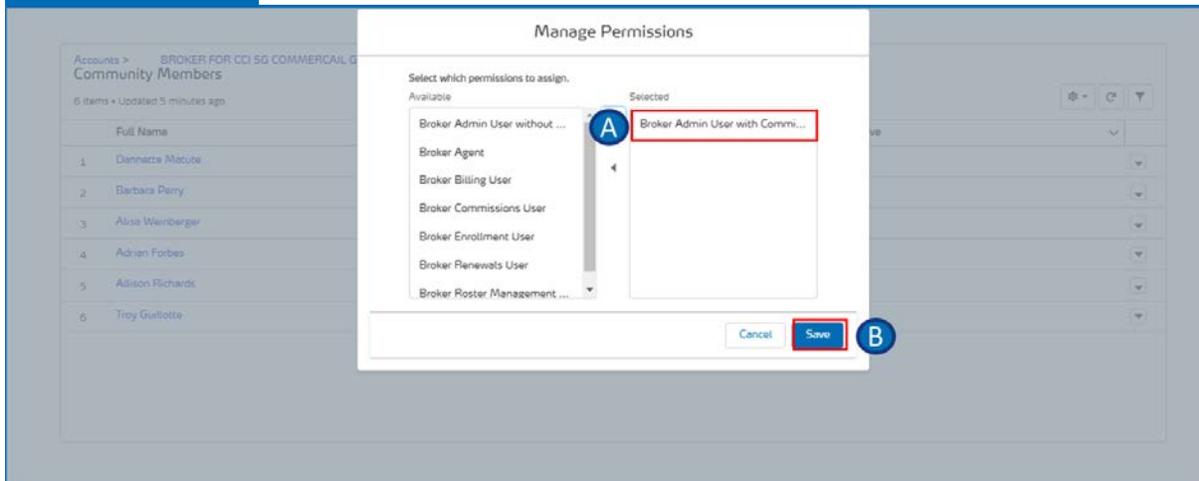
The **Manage Permissions** dialog box displays.

- 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.





Step 14:

The permission set matrix for different types of users are available. Permission will be set based on each user role.

Different profiles and associated access are available based on the user's role/hierarchy in the organization.

Roles / Permission Sets	Principal User (IA, Independent, TPA)	Admin User with Commission	Admin User without Commission	Agent	Billing User	Commissions User	Broker 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	X
Create Quote	X	X	X	X	X	X	X	X	X
Book of Business	X	X	X	X	X	X	X	X	X
List of Accounts	X	X	X	X	X	X	X	X	X
Account Detail	X	X	X	X	X	X	X	X	X
Add Member	X	X	X	X	X	X	X	X	X
Billing	X	X	X	X	X	X	X	X	X
Billing History	X	X	X	X	X	X	X	X	X
Sub-Group/ Plans	X	X	X	X	X	X	X	X	X
Sub-Group/ Plan Details	X	X	X	X	X	X	X	X	X
Employees	X	X	X	X	X	X	X	X	X
Employee/Dependent Detail	X	X	X	X	X	X	X	X	X
Edit Member, Eligibility, CLE, PCP	X	X	X	X	X	X	X	X	X
Documents (group-specific)	X	X	X	X	X	X	X	X	X
Commissions	X	X	X	X	X	X	X	X	X
List of Commissions	X	X	X	X	X	X	X	X	X
Commissions Detail	X	X	X	X	X	X	X	X	X
Agency Summary	X	X	X	X	X	X	X	X	X
Client Summary	X	X	X	X	X	X	X	X	X
Quotes	X	X	X	X	X	X	X	X	X
List of Quotes	X	X	X	X	X	X	X	X	X
Quote Details	X	X	X	X	X	X	X	X	X
Quote & Enroll	X	X	X	X	X	X	X	X	X
Applications	X	X	X	X	X	X	X	X	X
Renewals	X	X	X	X	X	X	X	X	X
List of Groups	X	X	X	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	X	X	X	X	X	X	X	X	X
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	X	X	X	X	X	X	X

Thank
You