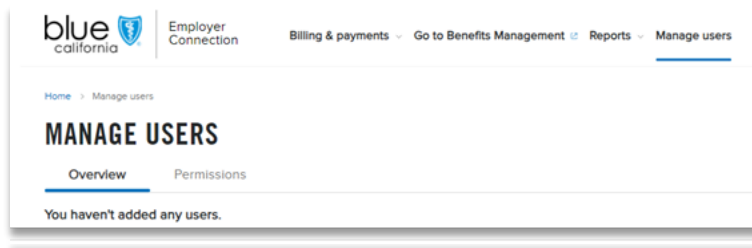


Manage Users

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

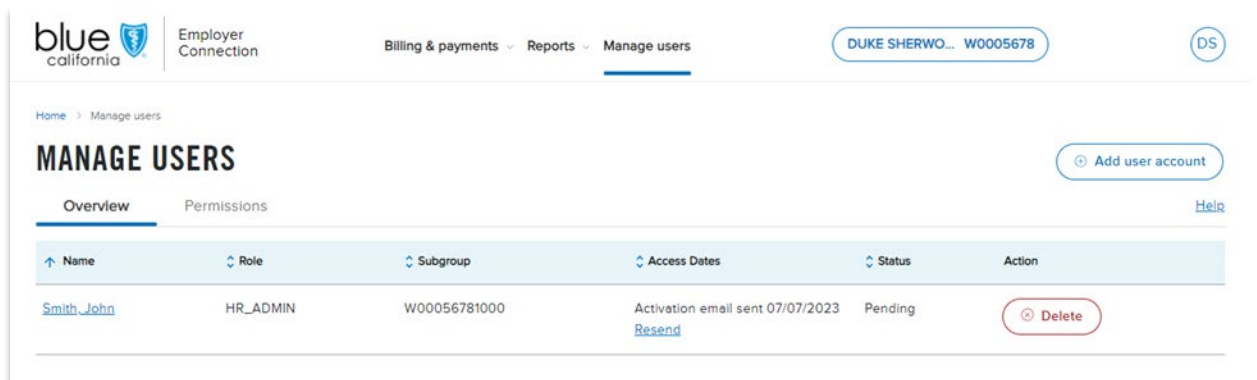


Delegate Visibility:

- Primary Contacts can access user management through the "Manage Users" section.
- Select "Manage Users" from the navigation menu to 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 easily add new user accounts from these tabs by clicking the "Add user account."



Comprehensive Overview:

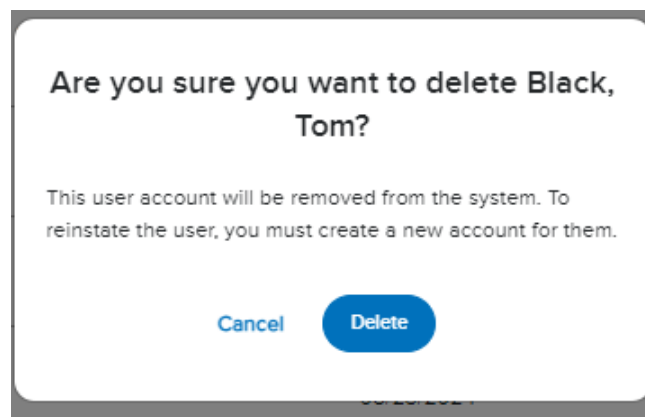
- The "Overview" tab displays users' roles, subgroup associations, access dates, status, and actions.
- The option to add user accounts and access the help window is conveniently located in the top right corner of the page.
- Sort fields like "Name," "Role," "Subgroup," "Access Dates," and "Status" for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

The screenshot shows the 'MANAGE USERS' interface. At the top, there are navigation links for 'Billing & payments', 'Reports', and 'Manage users'. A user ID 'SAM LINDER AU... W0067549' is displayed in the top right. Below the navigation, there is a breadcrumb 'Home > Manage users' and a title 'MANAGE USERS' with an 'Add user account' button. The main content area has two tabs: 'Overview' (selected) and 'Permissions'. A 'Help' link is also present. Below the tabs is a table with the following data:

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:

- Deleting a user requires confirmation to ensure accuracy.
- Proceeding removes access while canceling retains account access.

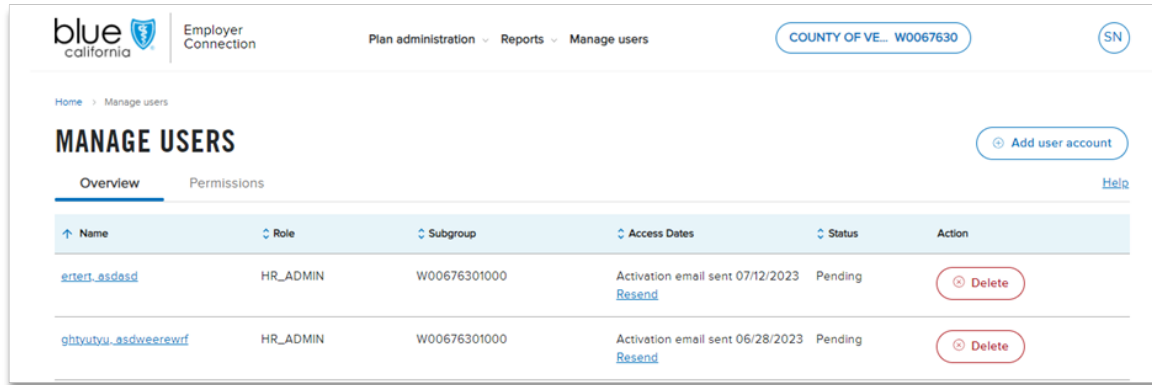




Employer
Connection

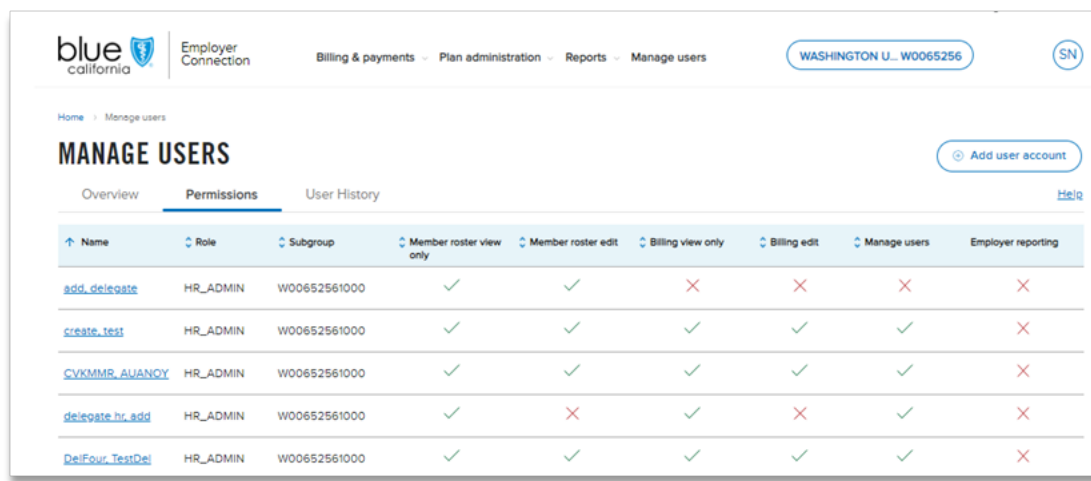
Efficient Management Features:

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.
- Clear symbols provide visual insights, making navigation smoother.



Adding New User Accounts:

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

The screenshot shows the 'ADD USER ACCOUNT' form in the Employer Connection interface. 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'.

Personal Information

All fields are required

First name, Last name, Phone, Email, Confirm email

Permissions by subgroup

Billing, Members and Users

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"/>

Reporting

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

Cancel Create account

At Blue Shield of California, we're committed to enhancing your user management experience. Our streamlined processes provide more control and offer a comprehensive overview. As we continue refining our platform, we're dedicated to making your interactions smoother and more efficient. If you have any questions, please refer to this guide or contact [Employer Services](#) for assistance.