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This Course

The screenshot shows the interface for the 'Manage Access eLearning' course. At the top, there is a blue header with 'Employer eServices®' on the left and 'Manage Access eLearning' in the center. To the right of the header, it says 'Welcome' and 'Page 1 of 4'. Below the header, the main content area has a blue title 'Welcome to Employer eServices Manage Access training!' followed by the text 'Manage your organization's access to Employer eServices health benefit data!'. On the right side, there is a dark grey sidebar with a 'This Course' section containing a list of menu items: 'Welcome', 'Navigation', 'Overview', 'Add Users', 'Work with Profiles', 'Work with Permissions', 'Search', 'Inactivate Users', and 'Reassign CMA'. Below the sidebar is a circular navigation control with 'STOP', '1', 'BACK', 'NEXT', and 'REPLAY' buttons. At the bottom of the sidebar, there are 'Audio ON OFF' controls and 'HOME', 'HELP', and 'EXIT' buttons. At the bottom left of the main content area, there is an 'AUDIO SCRIPT' section with the text: 'Hello and welcome to Employer eServices Manage Access training. This course will show you, the Client Master Administrator, how to monitor and update who has access to confidential health benefit data in your organization.' Below this is the copyright notice: '© 2004 United HealthCare Services, Inc. All rights reserved.'

Hello and welcome to Employer eServices Manage Access training. This course will show you, the Client Master Administrator, how to monitor and update who has access to confidential health benefit data in your organization.

The purpose of this course is to present the basic functions of Manage Access. Before you begin, you may want to print the Quick Reference Card, located in the course Help, so you can follow along with the procedures and take notes for later reference.

For more detailed information, refer to Online Help; we'll show you how to access this tool later. Or you can find out more about other training tools on the Employer eServices Training Information Home Page.

Employer eServices® Manage Access eLearning Welcome Page 2 of 4

You'll learn how to:

- Add Users
- Work with Profiles
- Work with Permissions
- Use Search
- Inactivate Users
- Reassign Client Master Administrator (CMA)

This Course

- Welcome
- Navigation
- Overview
- Add Users
- Work with Profiles
- Work with Permissions
- Search
- Inactivate Users
- Reassign CMA

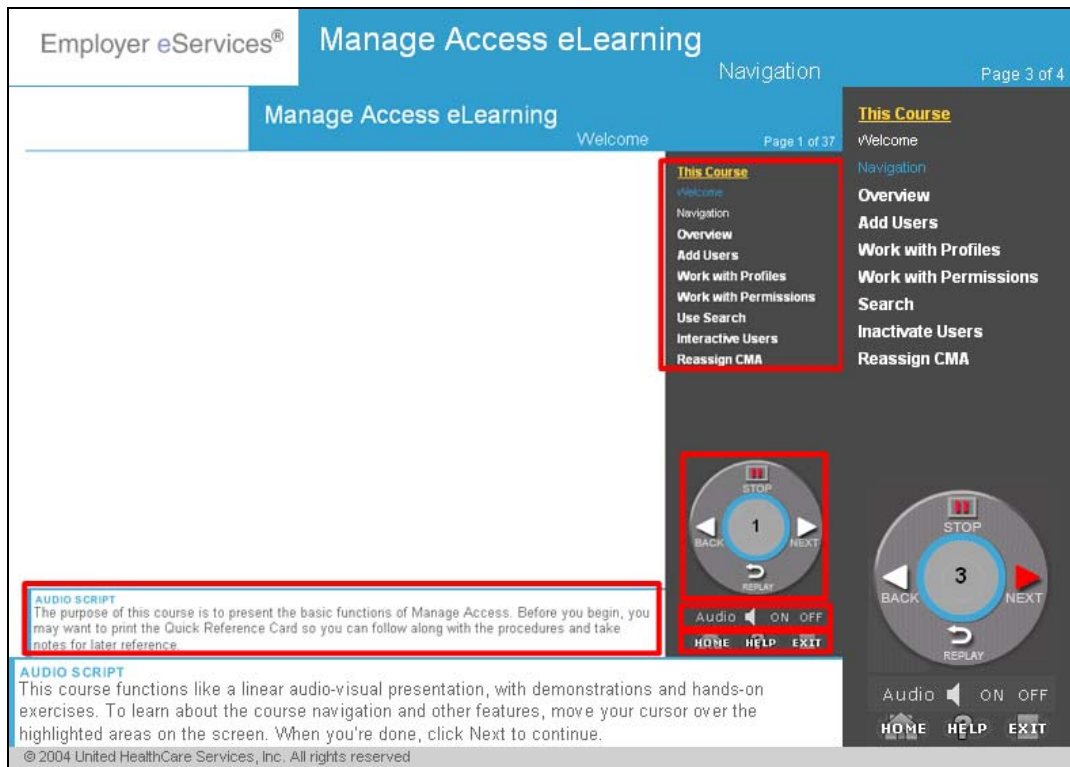
AUDIO SCRIPT

- Use Search
- Inactivate Users, and
- Reassign the Client Master Administrator in Manage Access.

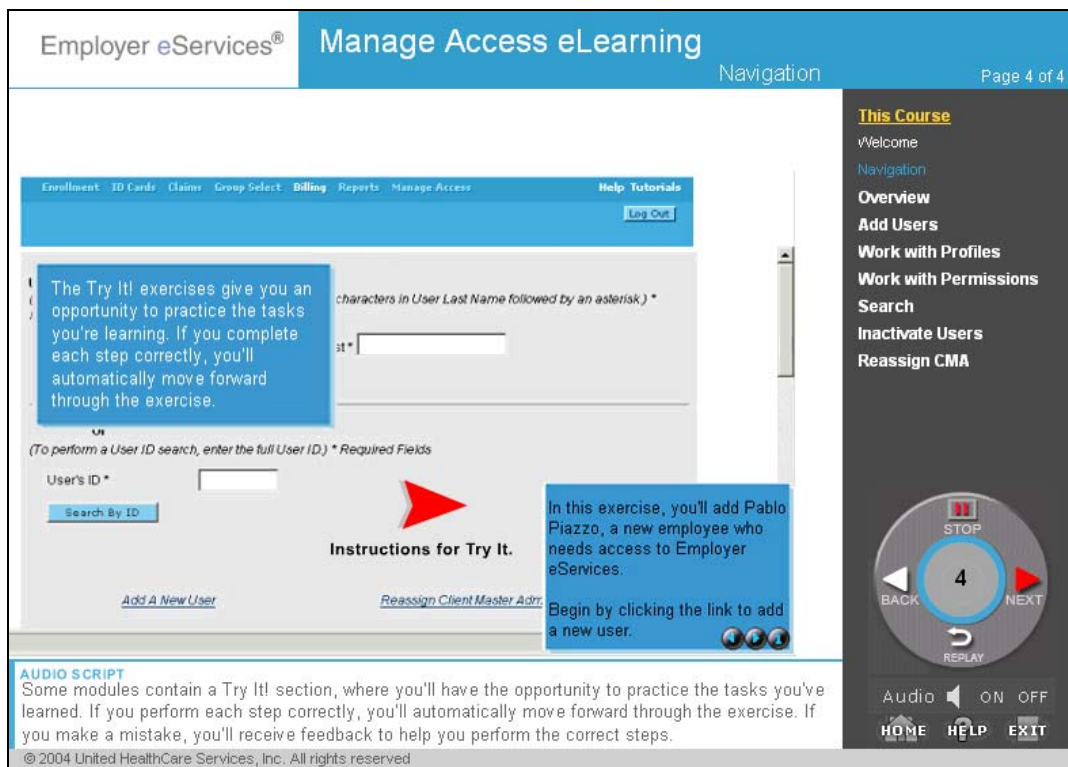
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By the time you finish the course, you'll know how to:

- Add Users,
- Work with Profiles and Permissions,
- Use Search,
- Inactivate Users, and
- Reassign the Client Master Administrator in Manage Access



This course functions like a linear audio-visual presentation, with demonstration and hands-on exercises. To learn about the course navigation and other features, move your cursor over the highlighted areas on the screen. When you're done, click Next to continue.



Some modules contain a Try It! section, where you'll have the opportunity to practice the tasks you've learned. If you perform each step correctly, you'll automatically move forward through the exercise. If you make a mistake, you'll receive feedback to help you perform the correct steps.

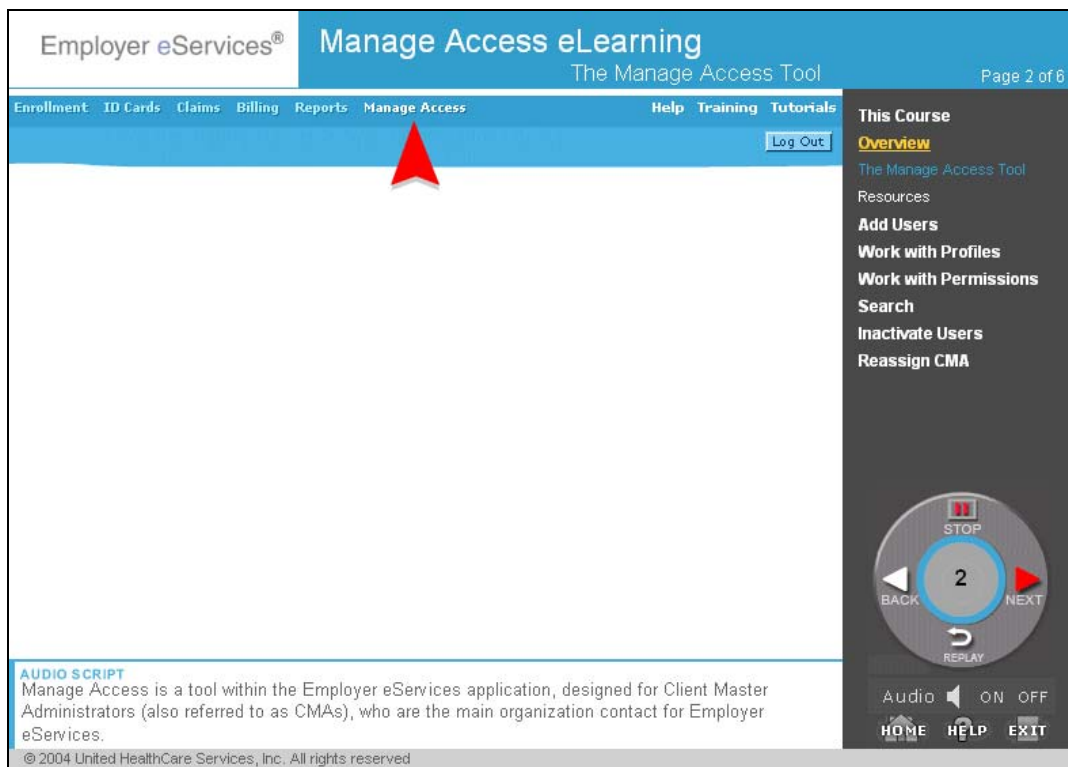
It only takes a couple minutes to complete the Try It!s and by doing so, you'll be able to work more efficiently when using Employer eServices Manage Access.

Overview

The screenshot shows the 'Manage Access eLearning' course interface. The top navigation bar includes 'Employer eServices®', 'Manage Access eLearning', 'Overview', and 'Page 1 of 6'. The main content area is titled 'Overview' and contains a bulleted list of topics: 'What is Manage Access?', 'When should I use Manage Access?', and 'Where can I get more information?'. A right-hand sidebar lists course sections: 'This Course', 'Overview', 'The Manage Access Tool', 'Resources', 'Add Users', 'Work with Profiles', 'Work with Permissions', 'Search', 'Inactivate Users', and 'Reassign CMA'. At the bottom right, there is a circular navigation control with 'STOP', '1', 'BACK', 'NEXT', and 'REPLAY' buttons. Below this is an 'Audio' control with 'ON' and 'OFF' options, and 'HOME', 'HELP', and 'EXIT' buttons. The footer contains the copyright notice: '© 2004 United HealthCare Services, Inc. All rights reserved.'

In this module, you'll find out

- What Employer eServices Manage Access is,
- When you should use it, and
- Where you can get more information after finishing this course.



Employer eServices® Manage Access eLearning
The Manage Access Tool Page 2 of 6

Enrollment ID Cards Claims Billing Reports Manage Access Help Training Tutorials Log Out

This Course
Overview
The Manage Access Tool
Resources
Add Users
Work with Profiles
Work with Permissions
Search
Inactivate Users
Reassign CMA

AUDIO SCRIPT
Manage Access is a tool within the Employer eServices application, designed for Client Master Administrators (also referred to as CMAs), who are the main organization contact for Employer eServices.

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Manage Access is a tool within the Employer eServices application, designed for Client Master Administrators (also referred to as CMAs), who are the main organization contact for Employer eServices. Manage Access allows you, the CMA, to manage your Employer eServices users by adding or inactivating them and assigning functional permissions, such as eligibility, billing, and reporting access.

Employer eServices®
Manage Access eLearning
The Manage Access Tool
Page 3 of 6

Use of this Manage Access Management function is governed by the Web Site Use Agreement, and the terms below. You certify that you have authority to agree to the terms below on behalf of your organization.

By creating additional User ID's for your office personnel to use, you acknowledge that you are giving others the ability to see confidential and personal information. As a result, you agree you will:

1. Keep your User ID and password **confidential**, and do not share it with anyone else.
2. Create User IDs only for those of your personnel who have a legitimate business need to use secured portions of www.employereservices.com for doing business with us.
3. Only allow access to the information the new user **requires** doing business with us.
4. Monitor on a regular and periodic basis **who** within your organization has access to the secured portions of www.employereservices.com, and make changes accordingly (e.g.inactive users).
5. The Client Master Administrator shall ensure that when a user is either a security risk or leaves their organization, that individual's User ID is promptly inactivated.
6. Advise all users that they are bound by the above terms.
7. The Manage Access function should be used only to add individuals employed by your Company. This function should **not** be used to add Consultants, Brokers, etc. Brokers should work with their Account Representative for access.

AUDIO SCRIPT
The first time you log in, the Client Master Administrator user agreement will automatically display. Since Manage Access allows you to give others the ability to see confidential and personal information, there are terms of use that you'll need to review and agree with.

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This Course

[Overview](#)

[The Manage Access Tool](#)

Resources

Add Users


Work with Profiles

Work with Permissions

Search

Inactivate Users

Reassign CMA



Audio ON OFF

[HOME](#) [HELP](#) [EXIT](#)

The first time you log in, the Client Master Administrator user agreement will automatically display. Since Manage Access allows you to give others the ability to see confidential and personal information, there are terms of use that you'll need to review and agree with. Once you click Submit, this screen will not display again unless you click the View User Agreement link within Manage Access.

The screenshot displays the 'Manage Access eLearning' interface. At the top, it features the Employer eServices logo and the title 'Manage Access eLearning' with the subtitle 'The Manage Access Tool' and 'Page 4 of 6'. The main content area is titled 'When should I use Manage Access?' and lists five bullet points: 'Monitor access for individuals', 'Add new users', 'Change user access', 'Search for individuals who have access', and 'Reassign the CMA'. To the right, a sidebar titled 'This Course' lists various sections: 'Overview', 'The Manage Access Tool', 'Resources', 'Add Users', 'Work with Profiles', 'Work with Permissions', 'Search', 'Inactivate Users', and 'Reassign CMA'. Below the sidebar is a circular audio player with a '4' in the center, and buttons for 'STOP', 'BACK', 'NEXT', and 'REPLAY'. At the bottom of the sidebar, there are 'Audio ON OFF' controls and 'HOME', 'HELP', and 'EXIT' buttons. A footer at the bottom left of the interface reads '© 2004 United HealthCare Services, Inc. All rights reserved'.

Employer eServices® **Manage Access eLearning**
The Manage Access Tool Page 4 of 6

When should I use Manage Access?

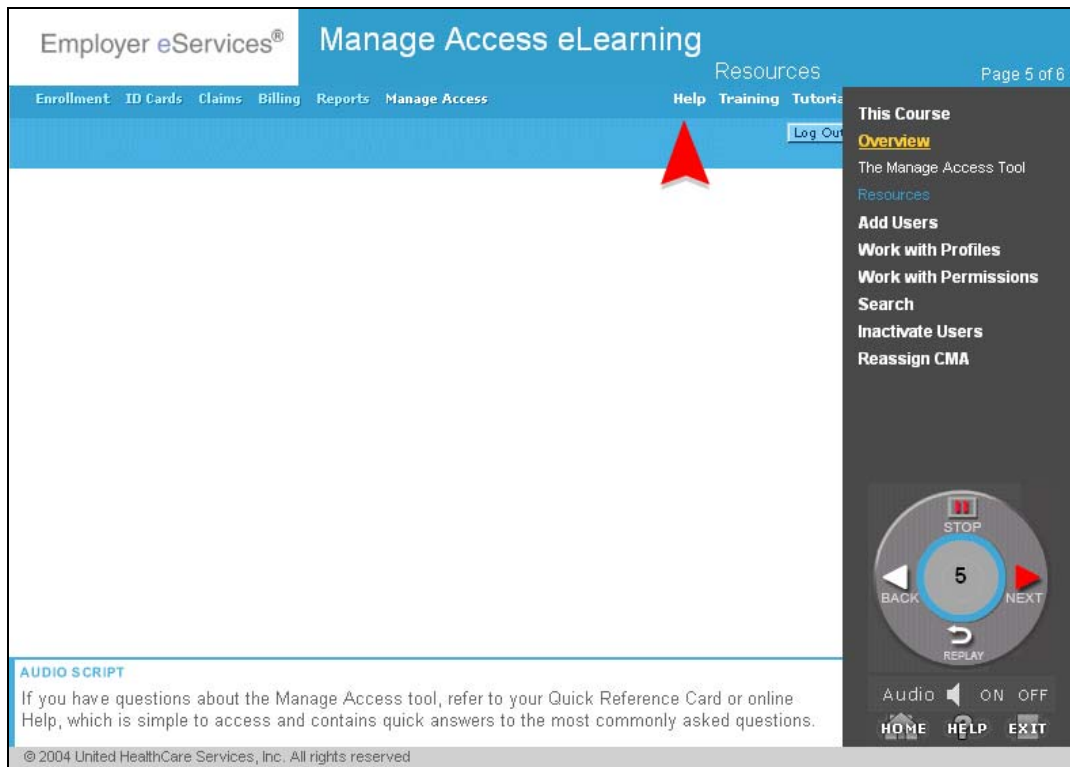
- Monitor access for individuals
- Add new users
- Change user access
- Search for individuals who have access
- Reassign the CMA

This Course
Overview
The Manage Access Tool
Resources
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Work with Permissions
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Inactivate Users
Reassign CMA

AUDIO SCRIPT
Use Manage Access whenever you need to add users, change user access capabilities, search for individuals who have access, or reassign Client Master Administrator access to someone else in your organization.

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As a Client Master Administrator, you should regularly monitor who in your organization has access to the confidential data available in Employer eServices. Use Manage Access whenever you need to add users, change user access capabilities, search for individuals who have access, or reassign Client Master Administrator access to someone else in your organization.



If you have questions about the Manage Access tool, refer to your Quick Reference Card or online Help, which is simple to access and contains quick answers to the most commonly asked questions.

Employer eServices® **Manage Access eLearning** Resources Page 6 of 6

Where can I get more information?

- Online Help
- Employer eServices Support

This Course

Overview
The Manage Access Tool

Resources

Add Users

Work with Profiles

Work with Permissions

Search

Inactivate Users

Reassign CMA

Employer eServices

Help

- About Help
- Bulletin Board
- Claims
- Contact Us
- How to Contact Us**
- Enrollment
- Group Select
- Log Out
- Login

How to Contact Us

When you have a question or problem that your designated Master Administrator, the Online Help tool, or the Tutorial tool is unable to resolve, please contact Employer eServices support at 1-800-651-5465.

AUDIO SCRIPT

If you still require assistance after using Online Help, toll-free support is available 24-hours a day, seven days a week through Employer eServices at 1-800-651-5465.

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If you still require assistance after using Online Help, toll-free support is available 24-hours a day, seven days a week through Employer eServices at 1-800-651-5465.

Add Users

The screenshot shows the 'Add Users' eLearning module interface. At the top, there is a blue header with 'Employer eServices®' on the left and 'Manage Access eLearning' in the center. Below the header, the page is divided into three main sections. On the left, under the heading 'Add Users', there is a list item '• New User'. On the right, there is a dark grey sidebar titled 'This Course' containing a table of contents with items like 'Overview', 'Add Users', 'Introduction', 'Add a New User', 'Try It!', 'Work with Profiles', 'Work with Permissions', 'Search', 'Inactivate Users', and 'Reassign CMA'. At the bottom right of the sidebar is a circular navigation control with buttons for 'STOP', 'BACK', 'NEXT', and 'REPLAY', and a central '1'. Below the sidebar, there is an 'AUDIO SCRIPT' section with a paragraph of text and a copyright notice '© 2004 United HealthCare Services, Inc. All rights reserved.' At the very bottom of the interface, there are controls for 'Audio' (ON/OFF) and buttons for 'HOME', 'HELP', and 'EXIT'.

There may be several people in your organization who help administer health care benefits through Employer eServices. In this module, you'll learn how to add new users. First, you'll see a step-by-step demo, then, you'll have the opportunity to try adding a user on your own.

To add a new user, you'd first click the Add A New User link on the bottom part of the screen.

Employer eServices® **Manage Access eLearning** Add a New User Page 3 of 8

Create User Profile For COMPANY1
Please enter the requested information below to create a new User.
On the next page you can assign permissions for this user. * *Required Fields*

The Manage Access function should be used only to add individuals employed by your company. The function should not be used to add Consultants, Brokers, etc. Brokers should work with their Account Representative for access.

User Information

| | |
|--------------------|---|
| User Type* | <input type="text" value="Client User"/> |
| First Name * | <input type="text" value="Kim"/> |
| Middle Initial | <input type="text"/> |
| Last Name * | <input type="text" value="Li"/> |
| Street Address 1 * | <input type="text" value="2965 E 34th St"/> |
| Street Address 2 | <input type="text"/> |
| Mail Route | <input type="text"/> |
| City * | <input type="text" value="Minneapolis"/> |

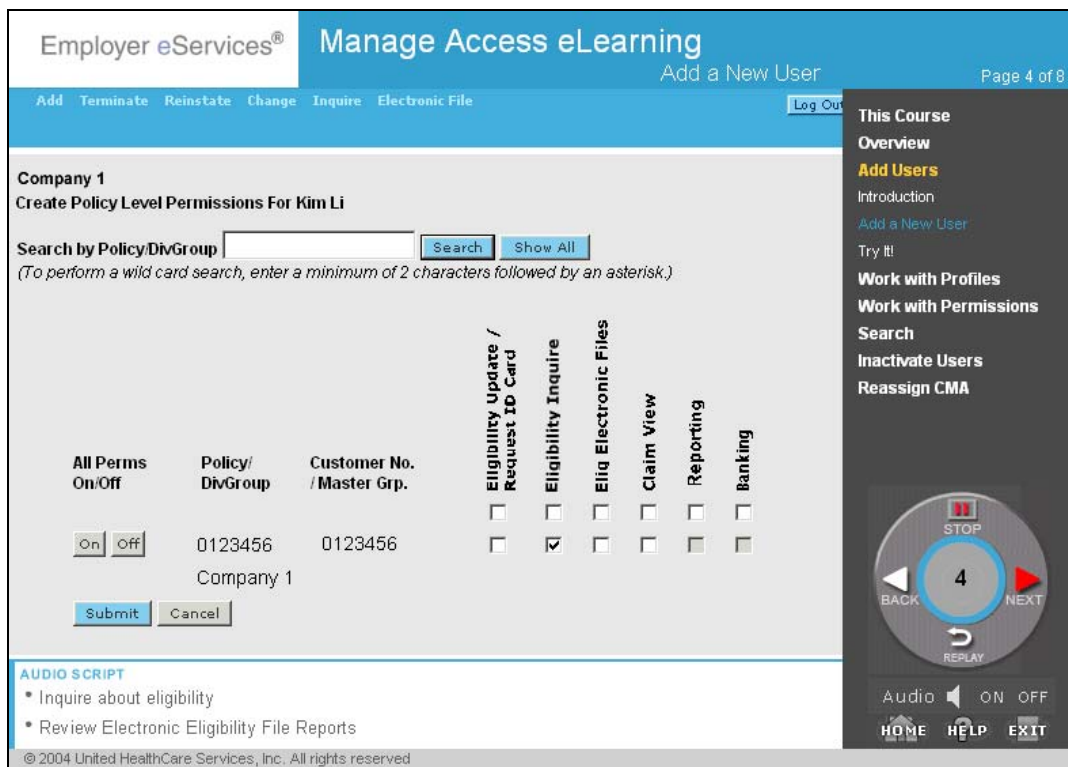
AUDIO SCRIPT
Next, you'd complete the user's profile by entering demographic information. Fields with an asterisk are required.

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This Course
Overview
Add Users
Introduction
[Add a New User](#)
Try It!
Work with Profiles
Work with Permissions
Search
Inactivate Users
Reassign CMA

STOP
3
BACK NEXT
REPLAY
Audio ON OFF
HOME HELP EXIT

Next, you'd complete the user's profile by entering demographic information. Fields with an asterisk are required.



Employer eServices® Manage Access eLearning Add a New User Page 4 of 8

Add Terminate Reinststate Change Inquire Electronic File Log Out

Company 1
Create Policy Level Permissions For Kim Li

Search by Policy/DivGroup Search Show All
(To perform a wild card search, enter a minimum of 2 characters followed by an asterisk.)

| All Perms On/Off | Policy/DivGroup | Customer No. / Master Grp. | Eligibility Update / Request ID Card | Eligibility Inquire | Elig Electronic Files | Claim View | Reporting | Banking |
|--|-----------------|----------------------------|--------------------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> On <input type="checkbox"/> Off | 0123456 | 0123456 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Company 1 | | | | | | | | |

Submit Cancel

AUDIO SCRIPT

- Inquire about eligibility
- Review Electronic Eligibility File Reports

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Next, you'd select the user's permissions from those available, including:

- Update eligibility and request ID cards,
- Inquire about eligibility,
- Review Electronic Eligibility File Reports
- View claims,
- Run reports and
- View banking reports

Then, you would click submit to assign billing permissions.

Employer eServices® **Manage Access eLearning** Add a New User [Log Out](#) Page 5 of 8

COMPANY1
Assign Billing Permissions for Kim Li
 Search By Customer Number, Bill group or Customer Number-Bill group combination
 (example: 1234567 or 1234567-2)

Once you click the Submit button, the Review Policy Level Permissions page displays again. For more information on permissions, see the Permissions module in this tutorial.

| All Perms On/Off | Customer Number | Customer Name | Bill Group Number | View Invoices | Pay Invoices |
|---|-----------------|---------------|-------------------|-------------------------------------|-------------------------------------|
| <input type="checkbox"/> On <input type="checkbox"/> Off | 0123456 | COMPANY1 | 1 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

AUDIO SCRIPT
 Next, you'd select the user's billing permissions from those available, including:

- Bill group permissions and

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This Course

Overview

Add Users

Introduction

[Add a New User](#)

Try It!

Work with Profiles

Work with Permissions

Search

Inactivate Users

Reassign CMA

Audio ON OFF

Next, you'd select the user's billing permissions from those available, including:

- Bill group permissions and
- Invoice permissions

The new user is “pending” until you click Confirm/Activate.

The screenshot shows the 'Manage Access eLearning' interface. At the top, it says 'Employer eServices®' and 'Manage Access eLearning'. Below that, there's a blue bar with 'Add a New User' and 'Page 7 of 8'. A 'Log Out' button is visible. The main content area is titled 'Review User Profile For Kim Li (user id is kli00001)'. Below the title, a message states: 'This user has been activated and an email notification has been sent.' A red arrow points to this message. Below the message, there's a link 'Do More with COMPANY1'. A section titled 'User Information' contains a table with the following data:

| User Information | |
|------------------|------------------|
| User Type | Client User |
| First Name | Kim |
| Middle Initial | |
| Last Name | Li |
| Street Address 1 | 2965 E. 34th St. |
| Street Address 2 | |
| Mail Route | |
| City | Minneapolis |
| State | MN |

Below the table, there's an 'AUDIO SCRIPT' section with the text: 'After you click the button, a message displays indicating the user has been activated. It's your turn to practice adding a user so you can remember how do these steps when using Manage Access.' At the bottom of the interface, there's a copyright notice: '© 2004 United HealthCare Services, Inc. All rights reserved.' On the right side, there's a navigation panel with a table of contents including 'This Course', 'Overview', 'Add Users', 'Introduction', 'Add a New User', 'Try It!', 'Work with Profiles', 'Work with Permissions', 'Search', 'Inactivate Users', and 'Reassign CMA'. Below the table of contents is a circular navigation control with 'STOP', 'BACK', '7', 'NEXT', and 'REPLAY' buttons. At the bottom of the navigation panel, there are 'Audio ON OFF', 'HOME', 'HELP', and 'EXIT' buttons.

After you click the button, a message displays indicating the user has been activated. It's your turn to practice adding a user so you can remember how do these steps when using Manage Access.

Employer eServices® Manage Access eLearning Try It! Page 8 of 8

Enrollment ID Cards Claims Billing Reports Banking Manage Access Help Training Tutorial Log Out

Company1

User Search
(To perform a wild card search, enter a minimum of 2 characters in User Last Name followed by an asterisk.) *
Required Fields

User Name First Last*

Or
(To perform a User ID search, enter the full User ID.) * R

User's ID*

In this exercise, you'll add Pablo Piazza, a new employee who needs access to Employer eServices.
Begin by clicking the link to add a new user.

[View / Update Client Profile](#) [Add A New User](#) [Reassign Client Master Administration](#)

This Course
Overview
Add Users
Introduction
Add a New User
Try It!
Work with Profiles
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Search
Inactivate Users
Reassign CMA

STOP
8
BACK NEXT
REPLAY
Audio ON OFF
HOME HELP EXIT

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Work with Profiles

The screenshot displays the 'Manage Access eLearning' interface. At the top, the header includes 'Employer eServices®' and 'Manage Access eLearning' with 'Introduction' and 'Page 1 of 8' on the right. The main content area is titled 'Work with Profiles' and lists three bullet points: 'View and Update User Profiles', 'View and Update Client Profiles', and 'Try It!'. To the right is a dark sidebar with a table of contents: 'This Course Overview', 'Add Users', 'Work with Profiles' (highlighted), 'Introduction', 'View User Profiles', 'Update User Profiles', 'View/Update Client Profiles', 'Try It!', 'Work with Permissions', 'Search', 'Inactivate Users', and 'Reassign CMA'. Below the sidebar is a circular navigation pad with 'STOP', '1', 'BACK', 'NEXT', and 'REPLAY' buttons. At the bottom, there are 'Audio ON OFF' and 'HOME HELP EXIT' buttons. A footer at the very bottom reads '© 2004 United HealthCare Services, Inc. All rights reserved.'

If you need to update user or client demographics, reporting level information, or status, you can do this by updating the profile of the user or client. In this module, you'll see a demo on how to view and update profiles and then you'll have the opportunity to try these tasks on your own.

The screenshot displays the 'Manage Access eLearning' interface. At the top, there is a search section with a text input for 'User's ID *' and a 'Search By ID' button. Below this, a message states 'Your search returned the following results:' followed by a list of search results. One result is highlighted, showing user details: 'User Name: Li, Kim', 'Client Name: Company 1', 'Status: Active', 'User Type: Client User', 'User Policy Level Permissions: View / Update', 'User Billing Permissions: View / Update', and 'User Profile: View / Update'. A red arrow points to the 'View / Update' link for the 'User Profile' field. A blue callout box contains the text: 'To view a user's profile, you'd click View (User Profile)'. On the right side, there is a vertical navigation menu with options like 'Overview', 'Add Users', 'Work with Profiles', 'Introduction', 'View User Profiles', 'Update User Profiles', 'View/Update Client Profiles', 'Try It!', 'Work with Permissions', 'Search', 'Inactivate Users', and 'Reassign CMA'. At the bottom right, there is a circular navigation overlay with buttons for 'STOP', 'BACK', 'NEXT', and 'REPLAY', along with an 'Audio' control and 'HOME', 'HELP', 'EXIT' buttons. The footer of the page includes the copyright notice: '© 2004 United HealthCare Services, Inc. All rights reserved'.

First, to view a user profile, you simply find the user you want and then click View by the words User Profile.

Employer eServices®
Manage Access eLearning
View User Profiles Page 3 of 10

Do More with Company 1

User Information

| | |
|------------------|------------------|
| User Type | Client User |
| First Name | Kim |
| Middle Initial | |
| Last Name | Li |
| Street Address 1 | 2965 E 34th St. |
| Street Address 2 | |
| Mail Route | |
| City | Minneapolis |
| State | MN |
| Zip Code | 55112 - 0000 |
| Phone Number | (612) 555- 4321 |
| Email | kli@company1.com |
| Role | Administrator |

This Course

Overview

Add Users

Work with Profiles

Introduction

[View User Profiles](#)

Update User Profiles

View/Update Client Profiles


Try It!

Work with Permissions

Search

Inactivate Users

Reassign CMA



Audio ON OFF

[HOME](#) [HELP](#) [EXIT](#)

AUDIO SCRIPT

The user's profile would display and you'd scroll to view the information.

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The user's profile would display and you'd scroll to view the information.

The screenshot displays the 'Manage Access eLearning' interface. At the top, it says 'Update User Profiles' and 'Page 4 of 10'. Below the header, there is a search section with a text box for 'User's ID *' and a 'Search By ID' button. A message states: 'Your search returned the following results: Select the links below to view or update existing users.' Below this, there are several links: '[View / Update Client Profile](#)', '[Add A New User](#)', and '[User Administration](#)'. A blue callout box points to the 'Update' link in the 'User Profile' section, containing the text: 'Click Update to update a user's profile.' The user profile details for 'Li, Kim' are shown, including 'Client Name: Company 1', 'Status: Active', 'User Type: Client User', and 'Last Log: 2/14/20'. The 'User Policy Level Permissions', 'User Billing Permissions', and 'User Profile' sections each have 'View / Update' links. A red arrow points to the 'Update' link in the 'User Profile' section. At the bottom, there is an 'AUDIO SCRIPT' section with the text: 'If you need to update a user's profile, click Update, next to User Profile, under the correct user name.' On the right side, there is a navigation panel with options like 'Overview', 'Add Users', 'Work with Profiles', 'Work with Permissions', 'Search', 'Inactivate Users', and 'Reassign CMA'. At the bottom right, there is a circular navigation control with 'STOP', 'BACK', '4', 'NEXT', and 'REPLAY' buttons, and a volume control section with 'Audio ON OFF' and 'HOME HELP EXIT' buttons. The footer contains the copyright notice: '© 2004 United HealthCare Services, Inc. All rights reserved.'

If you need to update a user's profile, click Update, next to User Profile, under the correct user name.

The screenshot displays the 'Manage Access eLearning' interface. At the top, the header includes 'Employer eServices®', 'Manage Access eLearning', 'Update User Profiles', and 'Page 5 of 10'. Below the header is a navigation bar with links for 'Enrollment', 'ID Cards', 'Claims', 'Group Select', 'Billing', 'Reports', 'Manage Access', 'Help', and 'Tutorials'. A 'Log Out' button is also present.

The main content area is titled 'User Information' and contains a form with the following fields:

- User Type * (dropdown menu): Client User
- First Name * (text field): Km
- Middle Initial (text field):
- Last Name * (text field): Li
- Street Address 1 * (text field): 2965 E. 34th St.
- Street Address 2 (text field):
- Mail Route (text field):
- City * (text field): Minneapolis
- State * (dropdown menu): MN
- Zip Code * (text field): 55112 -
- Phone Number * (text field): (612) 555-4321 ext.
- Email * (text field): kli@company1.com

Below the form is an 'AUDIO SCRIPT' section with the text: 'The profile would display with editable fields. In this demo, we'll update the phone number and submit the changes.'

On the right side, there is a sidebar with the following sections:

- This Course**
- Overview**
- Add Users**
- Work with Profiles**
- Introduction
- View User Profiles
- Update User Profiles
- View/Update Client Profiles
- Try It!
- Work with Permissions**
- Search**
- Inactivate Users**
- Reassign CMA**

At the bottom of the sidebar is a circular navigation control with buttons for STOP, BACK, NEXT, and REPLAY, and a central display showing the number 5. Below this control are buttons for Audio (ON/OFF), HOME, HELP, and EXIT.

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The profile would display with editable fields. In this demo, we'll update the phone number and submit the changes.

Employer eServices® **Manage Access eLearning** Update User Profiles Page 6 of 10

Enrollment ID Cards Claims Group Select Billing Reports Manage Access Help Tutorials Log Out

City * Minneapolis
State MN
Zip Code * 55112 -
Phone Number * (952) 555 - 4321 ext.
kli@company1.com
Administrator
Billing

In the Phone Number field, we changed the number to 952-555-4321.

Status Active Inactive
Reporting * Yes No
Reporting Level Standard
Access Non-Confidential Confidential

Submit Submit & Continue Cancel

This Course
Overview
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View/Update Client Profiles
Try It!
Work with Permissions
Search
Inactivate Users
Reassign CMA

STOP
6
BACK NEXT
REPLAY
Audio ON OFF
HOME HELP EXIT

AUDIO SCRIPT

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The screenshot displays the 'Manage Access eLearning' interface. At the top, the title 'Manage Access eLearning' is shown with 'Update User Profiles' and 'Page 7 of 10' to its right. A navigation bar includes links for 'Enrollment', 'ID Cards', 'Claims', 'Group Select', 'Billing', 'Reports', 'Manage Access', and 'Help Tutorials', along with a 'Log Out' button. The main content area is titled 'Review User Profile For Kim Li (user id is kl000001)' and includes a 'Do More' link. Below this is a 'User Information' table with the following data:

| User Information | |
|------------------|------------------|
| User Type | Client User |
| First Name | Kim |
| Middle Initial | |
| Last Name | Li |
| Street Address 1 | 2965 E. 34th St. |
| Street Address 2 | |
| Mail Route | |
| City | Minneapolis |
| State | MN |
| Zip Code | 55112 |
| Phone Number | (952) 555- 4321 |

Below the table is an 'AUDIO SCRIPT' section with the text: 'After clicking Submit, the profile would display with the updated information.' A red arrow points to the 'State' field in the table. On the right side of the interface is a dark sidebar with course navigation options: 'This Course', 'Overview', 'Add Users', 'Work with Profiles', 'Introduction', 'View User Profiles', 'Update User Profiles', 'View/Update Client Profiles', 'Try It!', 'Work with Permissions', 'Search', 'Inactivate Users', and 'Reassign CMA'. At the bottom of the sidebar is a circular navigation pad with 'STOP', '7', 'BACK', 'NEXT', and 'REPLAY' buttons, and an 'Audio' control with 'ON' and 'OFF' options. At the very bottom, there are 'HOME', 'HELP', and 'EXIT' buttons and a copyright notice: '© 2004 United HealthCare Services, Inc. All rights reserved.'

After clicking Submit, the profile would display with the updated information.

The screenshot displays the 'Manage Access eLearning' interface. At the top, it says 'Employer eServices® Manage Access eLearning View/Update Client Profiles Page 8 of 10'. Below the header, there is a search field for 'User's ID *' with a red arrow pointing to it. A blue callout box says: 'Click View to view a client's profile. Click Update to update a client's profile.' Below the search field, it says 'Your search returned the following results: Select the links below to view or update existing users.' There are three links: 'View / Update Client Profile', 'Add A New User', and 'Reassign Client Master Administr...'. Below these links, a user profile is shown for 'User Name: Li, Kim' and 'Client Name: Company 1'. The profile details include 'Status: Active', 'User Type: Client User', 'User Policy Level Permissions: View / Update', 'User Billing Permissions: View / Update', and 'User Profile: View / Update'. There is also a 'Last Log' date of '2/14/20'. Below the profile, there is a link for 'View User Agreement'. At the bottom, there is an 'AUDIO SCRIPT' section with the text: 'If you need to view or update a Client's profile, click View or Update, next to Client Profile.' On the right side, there is a navigation menu with options: 'This Course Overview', 'Add Users', 'Work with Profiles', 'Introduction', 'View User Profiles', 'Update User Profiles', 'View/Update Client Profiles', 'Try It!', 'Work with Permissions Search', 'Inactivate Users', and 'Reassign CMA'. At the bottom right, there is a circular navigation pad with buttons for 'STOP', '8', 'BACK', 'NEXT', and 'REPLAY'. Below the pad, there are 'Audio ON OFF' controls and 'HOME HELP EXIT' buttons. At the very bottom, there is a copyright notice: '© 2004 United HealthCare Services, Inc. All rights reserved.'

If you need to view or update a Client's profile, click View or Update, next to Client Profile.

The screenshot displays the 'Manage Access eLearning' interface. The main content area is titled 'Update Client Profile' and contains a form for updating client information. The form fields are as follows:

| | |
|------------------|-------------------|
| Client Name | Company 1 |
| Street Address 1 | 1234 Brenn Rd. E. |
| Street Address 2 | |
| City | Minnetonka |
| State | MN |
| Zip Code | 55436 |

Below the form is the 'Client Billing Settings' section. It includes a red arrow pointing to a link that says 'Click the link to see more information about a bill group.' The settings are:

- Customer No: 123456
- Bill group: 1 - Online and Paper invoicing
- Discontinue Paper?

At the bottom of the page, there is an 'AUDIO SCRIPT' section with the following text: 'This page displays the client profile. At the bottom of the page, you will also see the client billing settings. You can click a bill group link to see more information about that bill group, or, by selecting the checkbox, you can discontinue a paper invoice.' Below this is a copyright notice: '© 2004 United HealthCare Services, Inc. All rights reserved.'

On the right side of the interface, there is a navigation menu with the following items: 'This Course', 'Overview', 'Add Users', 'Work with Profiles', 'Introduction', 'View User Profiles', 'Update User Profiles', 'View/Update Client Profiles', 'Try It!', 'Work with Permissions', 'Search', 'Inactivate Users', and 'Reassign CMA'. At the bottom right, there is a circular navigation pad with buttons for 'STOP', 'BACK', 'NEXT', and 'REPLAY', and a volume control slider with 'ON' and 'OFF' options. Below the slider are buttons for 'HOME', 'HELP', and 'EXIT'.

This page displays the client profile.

At the bottom of page, you will also see the client billing settings. You can click a bill group link to see more information about that bill group, or, by selecting the checkbox, you can discontinue a paper invoice.

It's your turn to practice viewing and updating profiles so you can remember how to do these steps when using Manage Access.

The screenshot displays the 'Employer eServices® Manage Access eLearning' interface. The top navigation bar includes links for Enrollment, ID Cards, Claims, Billing, Reports, Banking, Manage Access, Help, Training, Tutorial, and a 'Log Out' button. The main content area features a search box labeled 'Search By ID' and a blue instructional box that reads: 'In this exercise, you'll view Pablo Piaggio's profile. Begin by clicking the correct link to view his profile.' Below this, there are several links: 'View / Update Client Profile', 'Add A New User', and 'Reassign Client Master Administration'. A detailed user profile for 'Pablo Piaggio' is shown, including fields for 'User Name', 'Client Name', 'User ID', 'Status', 'User Type', 'User Policy Level Permissions', 'User Billing Permissions', and 'User Profile'. A 'View User Agreement' link is also present. On the right side, a dark sidebar contains a course menu with sections like 'This Course Overview', 'Add Users', 'Work with Profiles', 'Work with Permissions', 'Search', 'Inactivate Users', and 'Reassign CMA'. At the bottom of the sidebar is a circular navigation control with 'STOP', 'BACK', 'NEXT', and 'REPLAY' buttons, and an 'Audio ON OFF' toggle. The footer of the page contains the copyright notice: '© 2004 United HealthCare Services, Inc. All rights reserved.'

Work with Permissions

The screenshot displays the 'Manage Access eLearning' interface. The top header includes 'Employer eServices®' on the left, 'Manage Access eLearning' in the center, and 'Introduction Page 1 of 10' on the right. The main content area is titled 'Work with Permissions' and contains a bulleted list: 'View User Permissions', 'Update User Permissions', and 'Try It!'. To the right is a navigation sidebar with a dark background, listing course sections: 'Overview', 'Add Users', 'Work with Profiles', 'Work with Permissions' (highlighted in yellow), 'Introduction', 'View User Permission', 'Update User Permission', 'Try It!', 'Search', 'Inactivate Users', and 'Reassign CMA'. Below the sidebar is a circular navigation control with 'STOP', 'BACK', '1', 'NEXT', and 'REPLAY' buttons. At the bottom of the sidebar, there are 'Audio ON OFF' controls and 'HOME HELP EXIT' buttons. The bottom of the main content area features an 'AUDIO SCRIPT' section with text about employee health benefit administration and a copyright notice: '© 2004 United HealthCare Services, Inc. All rights reserved.'

People in your organization may be responsible for different aspects of employee health benefit administration, such as billing, eligibility, or reporting. In this module, you'll learn how to view a user's permissions and make changes as necessary.

The screenshot displays the 'Manage Access eLearning' interface. At the top, there is a search bar for 'User's ID *' with a 'Search By ID' button. Below the search bar, a message states 'Your search returned the following results: Select the links below to view or update existing users.' A table of search results is shown, with a blue callout box pointing to the 'View' link under 'User Policy Level Permissions' for user 'Li, Kim'. The sidebar on the right contains a navigation menu with options like 'Overview', 'Add Users', and 'Work with Permissions'. At the bottom of the sidebar is a media control panel with buttons for 'STOP', 'BACK', 'NEXT', 'REPLAY', 'Audio', 'HOME', 'HELP', and 'EXIT'. The footer of the page includes the copyright notice '© 2004 United HealthCare Services, Inc. All rights reserved.'

To view user policy permissions, find the user and click View, next to User Policy Level Permissions, under the user's name.

The screenshot displays the 'Manage Access eLearning' interface. At the top, it says 'View User Permissions' and 'Page 3 of 10'. The main navigation bar includes 'Enrollment', 'ID Cards', 'Claims', 'Billing', 'Manage Access', 'Help', 'Training', and 'Tutorials'. Below this, there are links for 'Add', 'Terminate', 'Reinstate', 'Change', 'Inquire', and 'Electronic File', along with a 'Log Out' button.

The main content area is titled 'View Policy Level Permissions For Kim Li (user id is kli00001)'. It includes a 'Do More with Company 1' link and a search section for 'Policy/DivGroup' with a search box and 'Search' and 'Show All' buttons. A note below the search box states: '(To perform a wild card search, enter a minimum of 2 characters followed by an asterisk.)'

The permissions table is as follows:

| Policy/ DivGroup | Customer No. / Master Grp. | Eligibility Update / Request ID Card | Eligibility Inquire | Elig Electronic Files | Claim View | Reporting | Banking |
|---------------------|-------------------------------|---|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|
| 0123456 | 0123456 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Company 1 | | | | | | | |

At the bottom left, there is an 'AUDIO SCRIPT' section with the text 'Click Next to continue.' At the bottom right, there is a navigation control panel with a circular dial showing '3', buttons for 'STOP', 'BACK', 'NEXT', and 'REPLAY', and an 'Audio' toggle set to 'ON'. Below the dial are 'HOME', 'HELP', and 'EXIT' buttons.

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The user's permissions would display in view only mode.

The screenshot displays the 'Manage Access eLearning' interface. At the top, it says 'Employer eServices®' and 'Update User Permissions' with 'Page 4 of 10'. A search section asks for a 'User's ID *' with a 'Search By ID' button. Below, search results for 'Li. Kim' are shown with various permission links. A blue callout box points to the 'Update' link for 'User Policy Level Permissions'. A sidebar on the right contains course navigation options like 'Overview', 'Add Users', and 'Work with Permissions'. At the bottom of the sidebar is a navigation wheel with 'STOP', 'BACK', 'NEXT', and 'REPLAY' buttons, along with 'HOME', 'HELP', and 'EXIT' icons.

If you need to update policy level permissions, click Update, next to User Policy Level Permissions, under the correct user name.

Company 1
Update Policy Level Permissions For Kim Li

Search by Policy/DivGroup Search Show All
 (To perform a wild card search, enter a minimum of 2 characters followed by an asterisk.)

| All Perms On/Off | Policy/ DivGroup | Customer No. / Master Grp. | Eligibility Update / Request ID Card | Eligibility Inquire | Elig Electronic Files | Claim View | Reporting | Banking |
|------------------|------------------|----------------------------|--------------------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| On Off | 0123456 | 0123456 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Company 1
 Submit Cancel

AUDIO SCRIPT
 The permissions would display in editable mode. In this demo, we'll add the Claim View permission for this user.

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The permissions would display in editable mode. In this demo, we'll add the Claim View permission for this user.

Remember, the Electronic Files, Billing, and Reporting permissions require 24-48 hours to take effect; the other permissions will take effect immediately.

Employer eServices® Manage Access eLearning Update User Permissions Page 6 of 10

Enrollment ID Cards Claims Billing Manage Access Help Training Tutorial

Add Terminate Reinstatement Change Inquire Electronic File Log Out

View Policy Level Permissions For Kim Li (user id is kli00001)

Do More with Company 1

Search by Policy/DivGroup Search Show All

(To perform a wild card search, enter a minimum of 2 characters followed by an asterisk.)

| Policy/ DivGroup | Customer No. / Master Grp. | Eligibility Update / Request ID Card | Eligibility Inquire | Elig Electronic Files | Claim View | Reporting | Banking |
|---------------------|-------------------------------|---|-------------------------------------|--------------------------|-------------------------------------|--------------------------|--------------------------|
| 0123456 | 0123456 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Company 1 | | | | | | | |

AUDIO SCRIPT

After clicking Submit, the updated permissions information would display.

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This Course Overview Add Users Work with Profiles Work with Permissions Introduction View User Permissions Update User Permissions Try It! Search Inactivate Users Reassign CMA

STOP 6 BACK NEXT REPLAY

Audio ON OFF HOME HELP EXIT

After clicking Submit, the updated permissions information would display.

The screenshot displays the 'Manage Access eLearning' interface. At the top, it says 'Employer eServices®' and 'Manage Access eLearning'. Below this is a search area with a text box for 'User's ID *' and a 'Search By ID' button. A blue callout box explains: 'To view a user's billing permissions, click View (User Billing permissions). To update a user's billing permissions, click Update (User Billing Permissions)'. Below the search area, it says 'Your search returned t' and 'Select the links below to view'. There are three links: 'View / Update Client Profile', 'Add A New User', and 'Reassign Client Master Administr'. Below these is a user profile for 'User Name: Li, Kim' and 'Client Name: Company 1'. The user ID is 'kli00'. The user's status is 'Active' and 'User Type: Client User'. Under 'User Policy Level Permissions', there are links for 'View / Update', 'View / Update', and 'View / Update'. A red arrow points to the 'View / Update' link for 'User Billing Permissions'. Below the user profile is a 'View User Agreement' link. At the bottom, there is an 'AUDIO SCRIPT' section with the text: 'To view or update the user's billing permissions, click View or Update, next to User Billing Permissions, under their name.' On the right side of the interface, there is a navigation panel with a 'This Course' section containing 'Overview', 'Add Users', 'Work with Profiles', and 'Work with Permissions'. Below this is a circular navigation pad with 'STOP', 'BACK', '7', 'NEXT', and 'REPLAY' buttons. At the bottom right, there are 'HOME', 'HELP', and 'EXIT' buttons. The page number 'Page 7 of 10' is visible in the top right corner.

To view or update the user's billing permissions, click View or Update, next to User Billing Permissions, under their name.

Employer eServices® **Manage Access eLearning** Update User Permissions [Logout](#) Page 8 of 10

Company 1
Update Billing Permissions for Kim Li

Search By Customer Number, Bill group or Custom (example: 1234567 or 1234567-2) -

Click a Bill Group Number link to see more information about that group. Update invoice permissions by clicking a checkbox.

| All Perms On/Off | Customer Number | Customer Name | Bill Group Number | View Invoices | Pay Invoices |
|---|-----------------|---------------|-------------------|--------------------------|--------------------------|
| <input type="checkbox"/> On <input type="checkbox"/> Off | 0123456 | Company 1 | 1 | <input type="checkbox"/> | <input type="checkbox"/> |

AUDIO SCRIPT
 This is the Billing Permissions page displayed in editable mode. This page allows you to change invoice view or pay permissions. Once you've made your updates, click Submit.

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This is the Billing Permissions page displayed in editable mode. This page allows you to change invoice view or pay permissions. Once you've made your updates, click Submit.

Employer eServices® Manage Access eLearning Update User Permissions Page 9 of 10

Enrollment ID Cards Claims Billing Manage Access Help Training Tutorial Log Out

Review Billing Permissions for Kim Li (user id is kli00001)
[Do More](#) with Company 1

Search By Customer Number, Bill group or Customer Number-Bill group combination
(example: 1234567 or 1234567-2)

-

| Customer Number | Customer Name | Bill Group Number | View Invoices | Pay Invoices |
|-----------------|---------------|-------------------|-------------------------------------|--------------------------|
| 0123456 | Company 1 | 1 | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

AUDIO SCRIPT
After clicking Submit, the updated permissions would display. It's your turn to practice viewing and updating permissions so you can remember how to do these steps when using Manage Access.

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This Course Overview
Add Users
Work with Profiles
Work with Permissions
Introduction
View User Permissions
[Update User Permissions](#)
Try It!
Search
Inactivate Users
Reassign CMA

STOP
9
BACK NEXT
REPLAY
Audio ON OFF
HOME HELP EXIT

After clicking Submit, the updated permissions would display.

It's your turn to practice viewing and updating permissions so you can remember how to do these steps when using Manage Access.

Search

The screenshot displays the 'Manage Access eLearning' interface. At the top, the 'Employer eServices®' logo is on the left, and 'Manage Access eLearning' is in the center, with 'Introduction' and 'Page 1 of 6' on the right. The main content area is titled 'Use Search' and contains a bulleted list: 'Search for Users', 'Search for IDs', and 'Try It!'. To the right is a dark sidebar with a 'This Course' menu listing 'Overview', 'Add Users', 'Work with Profiles', 'Work with Permissions', 'Search' (highlighted), 'Introduction', 'Search for Names', 'Search for IDs', 'Try It!', 'Inactivate Users', and 'Reassign CMA'. Below the menu is a circular navigation control with 'STOP', '1', 'BACK', 'NEXT', and 'REPLAY' buttons. At the bottom of the sidebar are 'Audio ON OFF', 'HOME', 'HELP', and 'EXIT' buttons. The bottom of the main content area has an 'AUDIO SCRIPT' section with the text: 'In this module, you'll learn how to search by User name and ID. First, you'll see a demo and then you'll have the opportunity to try the steps on your own.' A copyright notice '© 2004 United HealthCare Services, Inc. All rights reserved' is at the very bottom.

If your organization has many registered Employer eServices users, perhaps within various businesses or locations, you may find the Manage Access search feature useful to quickly find a user's record. In this module, you'll learn how to search by User name and ID. First, you'll see a demo and then you'll have the opportunity to try the steps on your own.

The screenshot shows the 'Manage Access eLearning' interface. At the top, there is a blue header with 'Employer eServices®' on the left and 'Manage Access eLearning' in the center. Below the header is a search bar with the text 'Search for Names' and 'Page 2 of 6' on the right. A navigation menu below the search bar includes links for 'Enrollment', 'ID Cards', 'Claims', 'Group Select', 'Billing', 'Reports', 'Manage Access', 'Help', and 'Tutorials'. A 'Log Out' button is also present. The main content area is divided into two sections: 'User Search' and 'Or'. The 'User Search' section has a red arrow pointing to the 'Last*' field. Below it is an 'AUDIO SCRIPT' section with instructions on how to use wild card searches. On the right side, there is a vertical sidebar with a list of course topics and a circular navigation pad with buttons for 'STOP', 'BACK', 'NEXT', and 'REPLAY'. At the bottom of the sidebar are 'HOME', 'HELP', and 'EXIT' buttons.

To search by user name, you'd enter information in the field called Last. If you wanted to do a wild card search, you'd need to enter at least two characters and type an asterisk. If you were entering a complete last name, you could narrow your search, by entering a name in the field called First. In this demo, we'll search for users with the last name, Li.

Employer eServices® **Manage Access eLearning** Search for Names Page 3 of 6

*(To perform a User ID search, enter the full User ID.) * Required Fields*

User's ID *

[Search By ID](#)

Then, you'd scroll to see the search results. The users who meet your search criteria would display here.

our search returned the following results:

Select the links below to view or update existing users.

[View / Update Client Profile](#) [Add A New User](#) [Reassign Client Master Administration](#)

User Name: Li, Kim **User ID:** kl000

Client Name: Company 1

Status: Active **User Policy Level Permissions:** [View / Update](#)

User Type: Client User **User Billing Permissions:** [View / Update](#) **Last Log:** 2/14/20

User Profile: [View / Update](#)

[View User Agreement](#)

AUDIO SCRIPT

Once the search has been completed, you'd scroll down to see the results.

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This Course

- Overview
- Add Users
- Work with Profiles
- Work with Permissions
- Search**
- Introduction
- [Search for Names](#)
- Search for IDs
- Try It!
- Inactivate Users
- Reassign CMA

STOP

3

BACK NEXT

REPLAY

Audio ON OFF

HOME HELP EXIT

Once the search has been completed, you'd scroll down to see the results.

Employer eServices® Manage Access eLearning Search for IDs Page 4 of 6

Enrollment ID Cards Claims Group Select Billing Reports Manage Access Help Tutorials Log Out

User Search
(To perform a wild card search, enter a minimum of 2 characters in User Last Name followed by an asterisk.) * Required Fields

User Name First Last*

Search By Name

Or
(To perform a User ID search, enter the full User ID.) * Required

User's ID*

Search By ID

In the User's ID field, you'd type the complete ID of the user you want to find.

AUDIO SCRIPT
To do this, you'd type the ID in the User's ID field. In this demo, we'll search for user kli00001 and click Search.

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This Course
Overview
Add Users
Work with Profiles
Work with Permissions
Search
Introduction
Search for Names
Search for IDs
Try It!
Inactivate Users
Reassign CMA

STOP
4
BACK NEXT
REPLAY
Audio ON OFF
HOME HELP EXIT

You can also search by User ID if you know the complete ID. To do this, you'd type the ID in the User's ID field. In this demo, we'll search for user kli00001 and click Search.

The screenshot displays the 'Manage Access eLearning' interface. At the top, there is a search bar with the text 'Search for IDs' and 'Page 5 of 6'. Below the search bar, there is a section for search results. A blue box highlights the text 'The user who meets your search criteria would display here.' with a red arrow pointing to the search results. The search results show a user profile for 'Li, Kim' with 'User ID: ki00001'. The profile includes details such as 'Status: Active', 'User Policy Level Permissions: View / Update', 'User Billing Permissions: View / Update', and 'User Profile: View / Update'. There is also a 'Last Login: 2/14/2005' field. A navigation panel on the right side of the screen contains various options like 'Overview', 'Add Users', 'Work with Profiles', 'Work with Permissions', 'Search', 'Introduction', 'Search for Names', 'Search for IDs', 'Try It!', 'Inactivate Users', and 'Reassign CMA'. At the bottom of the screen, there is an 'AUDIO SCRIPT' section with a play button and a volume control slider.

Again, once the search has been completed, you'd scroll down to see the results.

It's your turn to practice searching by User Name and ID so you can remember how to do these steps when using Manage Access.

The screenshot displays the 'Employer eServices® Manage Access eLearning' interface. The top navigation bar includes 'Enrollment', 'ID Cards', 'Claims', 'Group Select', 'Billing', 'Reports', 'Manage Access', and 'Help/Tutorials'. A 'Log Out' button is visible in the top right. The main content area is titled 'User Search' and contains two search methods: 'Search By Name' (with 'First' and 'Last' fields) and 'Search By ID' (with a 'User's ID' field). A blue callout box with white text is overlaid on the search fields, stating: 'In this exercise, you'll search for all users whose last name begins with Pi. Start by typing in the correct field and then click the button to begin your search.'

On the right side, a dark sidebar contains a course menu with the following items: 'This Course', 'Overview', 'Add Users', 'Work with Profiles', 'Work with Permissions', 'Search', 'Introduction', 'Search for Names', 'Search for IDs', 'Try It!', 'Inactivate Users', and 'Reassign CMA'. Below the menu is a circular navigation control with 'STOP', '6', 'BACK', 'NEXT', and 'REPLAY' buttons. At the bottom of the sidebar are 'Audio ON/OFF', 'HOME', 'HELP', and 'EXIT' buttons.

The browser window title is 'Show All Users - Microsoft Internet Explorer provided by UNITEDHealth Group'. The footer of the page reads '© 2004 United HealthCare Services, Inc. All rights reserved.'

Inactivate Users

The screenshot displays the 'Manage Access eLearning' interface. At the top, the 'Employer eServices®' logo is on the left, and 'Manage Access eLearning' is in the center. Below the logo, 'Introduction' and 'Page 1 of 6' are visible. The main content area is titled 'Inactivate User' and contains a bulleted list: '• Make User Inactive' and '• Try It!'. On the right side, there is a navigation menu with the following items: 'This Course', 'Overview', 'Add Users', 'Work with Profiles', 'Work with Permissions', 'Search', 'Inactivate Users' (highlighted in yellow), 'Introduction', 'Make a User Inactivate', 'Try It!', and 'Reassign CMA'. Below the menu is a circular navigation control with 'STOP', '1', 'BACK', 'NEXT', and 'REPLAY' buttons. At the bottom of the interface, there is an 'AUDIO SCRIPT' section with the text: 'In this module, you'll learn how to make users inactive. First, you'll see a step-by-step demo, and then you'll gain hands-on experience in the Try It! exercise.' Below this is an 'Audio' control with 'ON' and 'OFF' buttons, and 'HOME', 'HELP', and 'EXIT' buttons. A copyright notice at the very bottom reads: '© 2004 United HealthCare Services, Inc. All rights reserved.'

When users in your organization no longer need access to Employer eServices, you must inactivate their user IDs as soon as possible because the application contains confidential data. In this module, you'll learn how to make users inactive. First, you'll see a step-by-step demo, and then you'll gain hands-on experience in the Try It! exercise.

Employer eServices® Manage Access eLearning Make a User Inactive Page 2 of 6

Or
(To perform a User ID search, enter the full User ID.) * Required Fields

User's ID *

[Search By ID](#)

Your search returned the following results:

This user's status is Active.

[View /](#) [Add A New User](#) [Reassign Client Master Administr](#)

User Name: Kim **User ID:** kli00
Client Name: Company 1

Status: Active **User Policy Level Permissions:** [View / Update](#) **Last Log**
User Type: Client User **User Billing Permissions:** [View / Update](#)
User Profile: [View / Update](#)

AUDIO SCRIPT
First, you'd find the user you want to make inactive. In this demo, we'll use Kim Li. Notice that her status is Active.

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First, you'd find the user you want to make inactive. In this demo, we'll use Kim Li. Notice that her status is Active. Users are made inactive by updating their profiles. To do this, you'd click Update located next to User Profile.

Employer eServices® Manage Access eLearning Make a User Inactive Page 3 of 6

Log Out

This Course
Overview
Add Users
Work with Profiles
Work with Permissions
Search
Inactivate Users
Introduction
Make a User Inactive
Try It!
Reassign CMA

State * MN
Zip Code * 55112 - 0000
Phone Number * (612) 555 - 4321 ext.
Email * kli@company1.com
Role Administrator
Dept Billing
Status Active Inactive
Reporting * Yes No
Reporting Level None
Access Non-Confidential
Confidential

Submit Submit & Continue Cancel

AUDIO SCRIPT
Then, you'd scroll to the Status field, select Inactive, and click Submit.

STOP
3
BACK NEXT
REPLAY
Audio ON OFF
HOME HELP EXIT

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Then, you'd scroll to the Status field, select Inactive, and click Submit.

The profile would be updated and the user would no longer be able to access the Employer eServices site unless you were to make the User ID active again.

The screenshot shows the 'Manage Access eLearning' interface. At the top, it says 'Employer eServices®' and 'Manage Access eLearning'. Below that, it says 'Make a User Inactive' and 'Page 5 of 6'. The main content area has a search section with the text 'Or (To perform a User ID search, enter the full User ID.) * Required Fields'. There is a text input field for 'User's ID *' and a 'Search By ID' button. Below the search section, it says 'Your search returned the following results:'. A blue box highlights the text 'The user's status is Inactive.' with a red arrow pointing to it. Below this, there are links for 'View /', 'Add A New User', and 'Reassign Client Master Administr...'. The user details section shows 'User Name: Li...', 'Client Name: Company 1', 'User ID: kii00...', and 'Status: Inactive'. Other fields include 'User Policy Level Permissions: View / Update', 'User Billing Permissions: View / Update', and 'User Profile: View / Update'. At the bottom, there is an 'AUDIO SCRIPT' section with the text 'It's your turn to practice inactivating a user so you can remember how to do these steps when using Manage Access.' and a copyright notice '© 2004 United HealthCare Services, Inc. All rights reserved.' On the right side, there is a navigation menu with options like 'This Course', 'Overview', 'Add Users', 'Work with Profiles', 'Work with Permissions', 'Search', 'Inactivate Users', 'Introduction', 'Make a User Inactive', 'Try It!', and 'Reassign CMA'. At the bottom right, there is a circular navigation control with 'STOP', '5', 'BACK', 'NEXT', and 'REPLAY' buttons, and a volume control section with 'Audio ON OFF' and 'HOME HELP EXIT' buttons.

If you were to search for the user you just made inactive, you'd see her Status is now Inactive.

It's your turn to practice inactivating a user so you can remember how to do these steps when using Manage Access.

Reassign CMA

The screenshot displays the 'Manage Access eLearning' interface. At the top, the 'Employer eServices®' logo is on the left, and 'Manage Access eLearning' is in the center. Below this, 'Introduction' and 'Page 1 of 6' are visible. The main content area is titled 'Reassign Client Master Administrator (CMA)' and contains a single bullet point: 'Assign a New CMA'. To the right is a navigation sidebar with a dark background, listing course sections: 'This Course', 'Overview', 'Add Users', 'Work with Profiles', 'Work with Permissions', 'Search', 'Inactivate Users', 'Reassign CMA' (highlighted in yellow), 'Introduction', 'Assign a New CMA', and 'Try It!'. Below the sidebar is a circular media control interface with buttons for 'STOP', 'BACK', 'NEXT', and 'REPLAY', and a central '1' indicating the current slide. At the bottom of the sidebar, there are 'Audio ON OFF' controls and 'HOME', 'HELP', and 'EXIT' buttons. A footer at the bottom left of the interface reads '© 2004 United HealthCare Services, Inc. All rights reserved.'

Only one Client Master Administrator is allowed per organization at any given time. If you'd like to transfer your CMA responsibility to another member of your organization, you can do so using the Reassign CMA feature in Manage Access. In this module, we'll demonstrate how easily you can reassign a CMA, and then give you the opportunity to practice in the Try It! exercise.

To reassign a CMA, you'd click the link called Reassign Client Master Administrator.

Employer eServices® **Manage Access eLearning** Assign a New CMA Page 3 of 6

Enrollment ID Cards Claims Billing Reports Manage Access Help Training Tutorial Log Out

Reassign Client Master Administrator

As the Client Master Administrator, you have administrative access to 19 users. To assign a new user as Client Master Administrator, please select one of the users below and submit.

Please select from the following users

- Smith, John
- Li, Kim
- McDonough, Cheri
- Piazzo, Pablo
- Ramaiah, Auta
- Ramaiah, Auta
- Sachs, Lee
- Santhosam, LspackPon
- Smith, John**
- W1, S1
- WAN, SAN
- Young, Kris

Submit Cancel

Then, you'd select the new CMA from the user list and click Submit to complete the reassignment.

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AUDIO SCRIPT

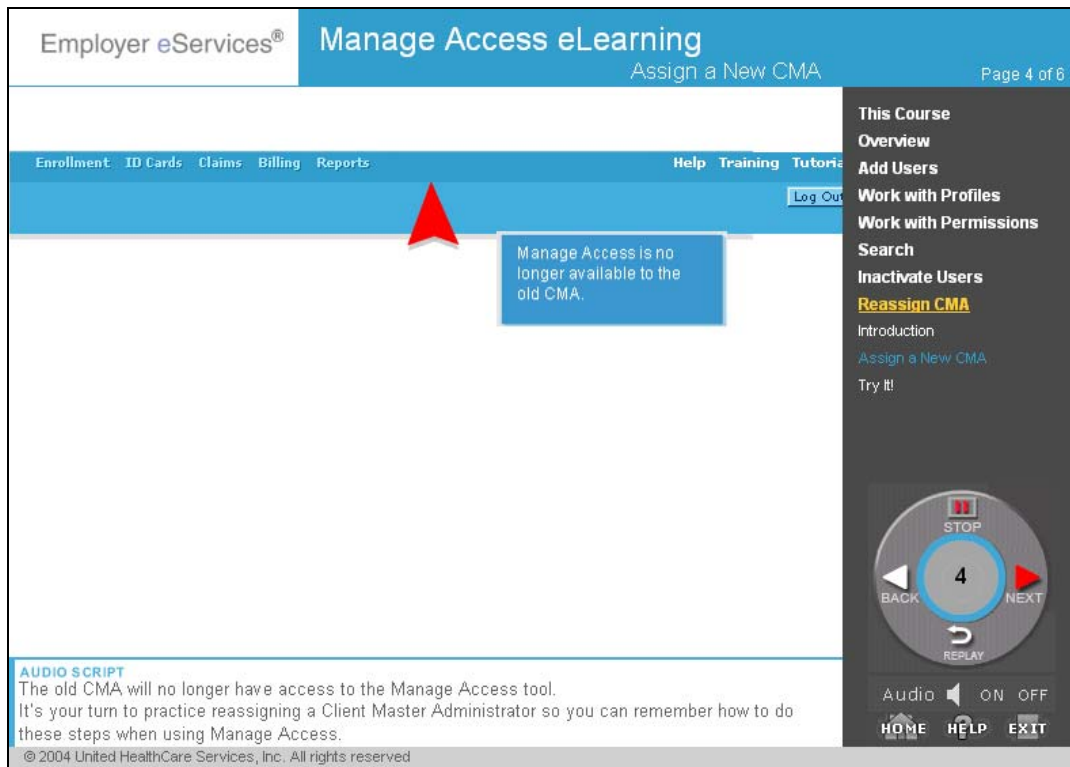
Next, you'd select an active user from the drop-down field.

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This Course
Overview
Add Users
Work with Profiles
Work with Permissions
Search
Inactivate Users
Reassign CMA
Introduction
Assign a New CMA
Try It!

STOP
3
BACK NEXT
REPLAY
Audio ON OFF
HOME HELP EXIT

Next, you'd select an active user from the drop-down field. In this demo, the new Client Master Administrator will be John Smith.



Once you've Submitted the name of the new CMA, the change is effective immediately. The system will automatically change the user type for the old CMA to User and the newly selected CMA to Client Master Administrator. The old CMA will no longer have access to the Manage Access tool.

It's your turn to practice reassigning a Client Master Administrator so you can remember how to do these steps when using Manage Access.

The screenshot shows the 'Employer eServices® Manage Access eLearning' interface. The top navigation bar includes links for Enrollment, ID Cards, Claims, Billing, Reports, Banking, Manage Access, Help, Training, and Tutorials. A 'Log Out' button is also present. The main content area is titled 'Company1' and features a 'User Search' section with instructions: 'To perform a wild card search, enter a minimum of 2 characters in User Last Name followed by an asterisk.*' and 'Required Fields'. There are two search options: 'Search By Name' and 'Search By ID'. A blue callout box is overlaid on the search area, containing the text: 'In this exercise, reassign the Client Master Administrator to Betty Jones. Begin, by clicking the correct link.' Below the search area, there are three links: 'View/Update Client Profile', 'Add A New User', and 'Reassign Client Master Administrator'. On the right side, a dark sidebar contains a course menu with items like 'Overview', 'Add Users', 'Work with Profiles', 'Work with Permissions', 'Search', 'Inactivate Users', and 'Reassign CMA'. At the bottom of the sidebar is a circular navigation control with 'STOP', '5', 'BACK', 'NEXT', and 'REPLAY' buttons, along with 'Audio ON OFF' and 'HOME HELP EXIT' buttons. The footer of the page reads '© 2004 United HealthCare Services, Inc. All rights reserved.'

Congratulations! You've successfully completed the Manage Access training. We'd like your feedback about this course. Click here to access our online survey, which takes only a few minutes to complete. After you've submitted the survey, we recommend you go into the Employer eServices Manage Access tool to explore your new access.