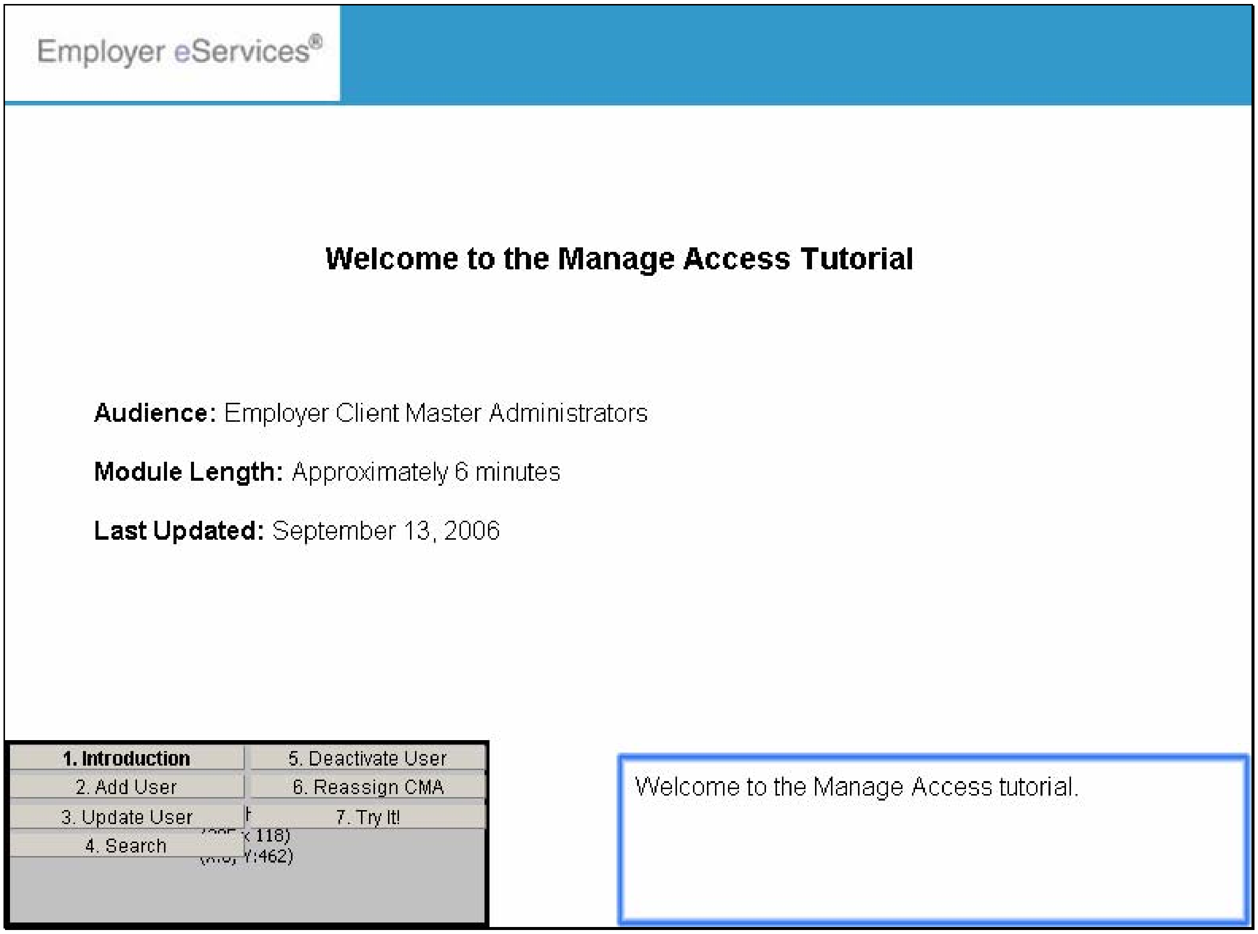
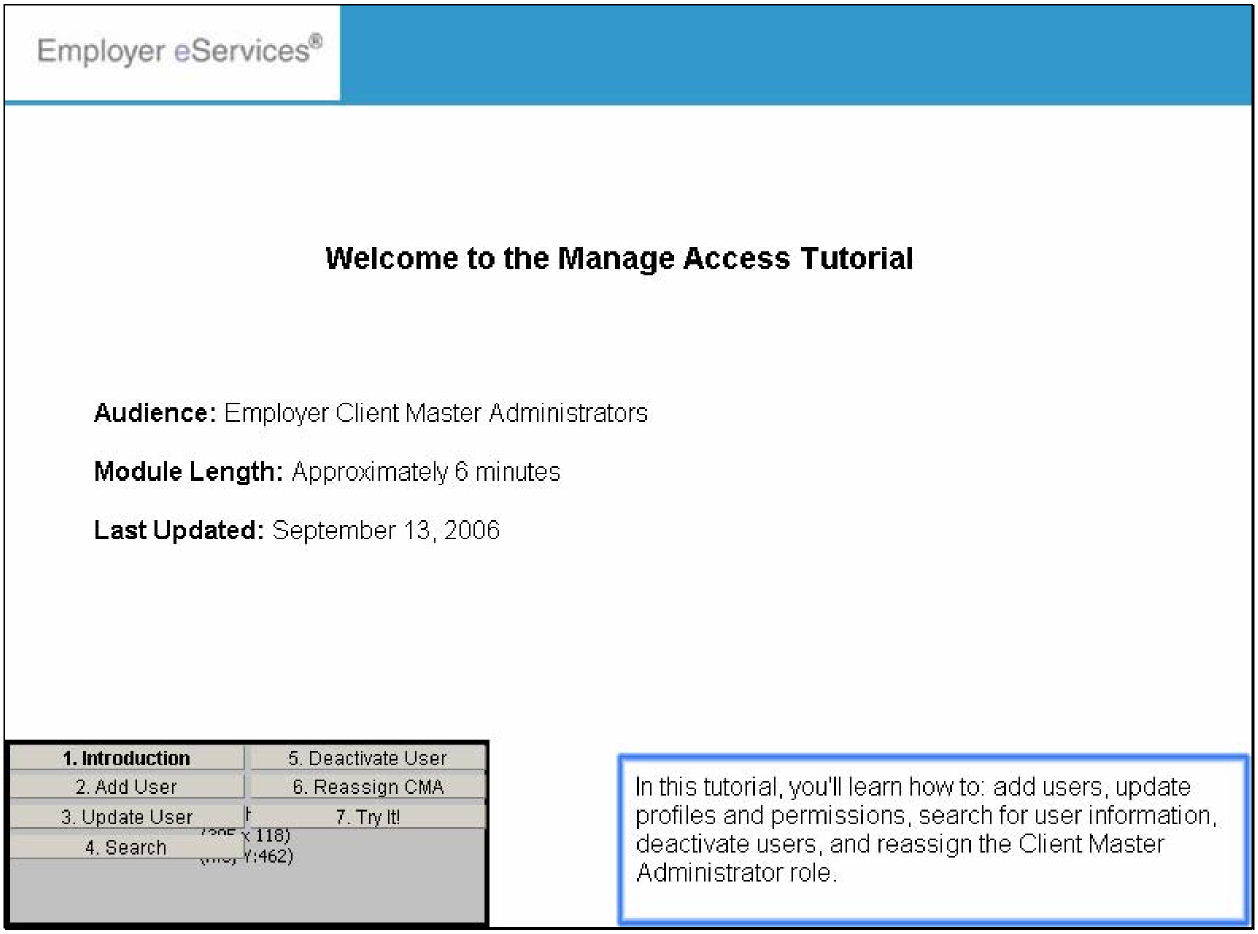
001



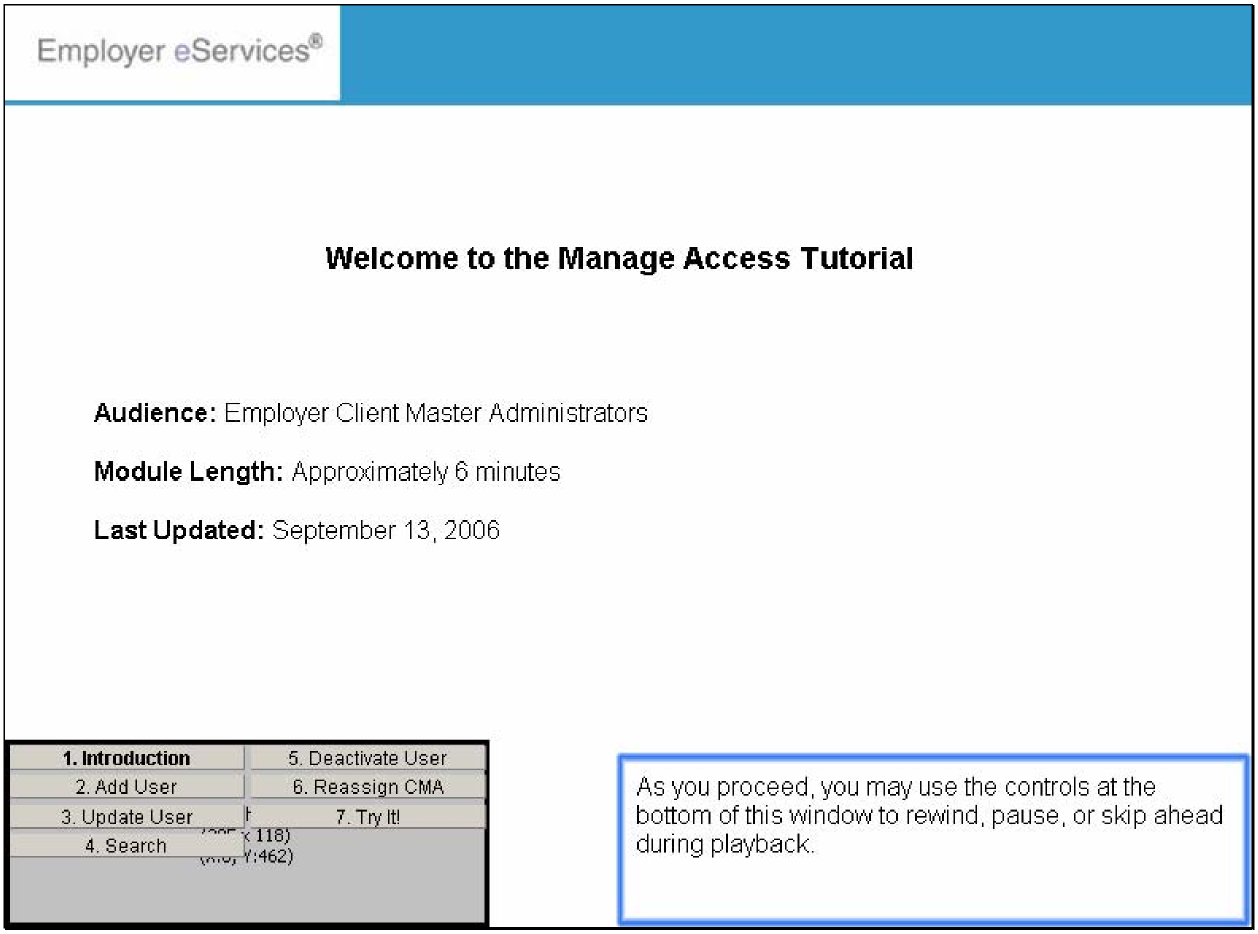
Welcome to the Manage Access tutorial.

002



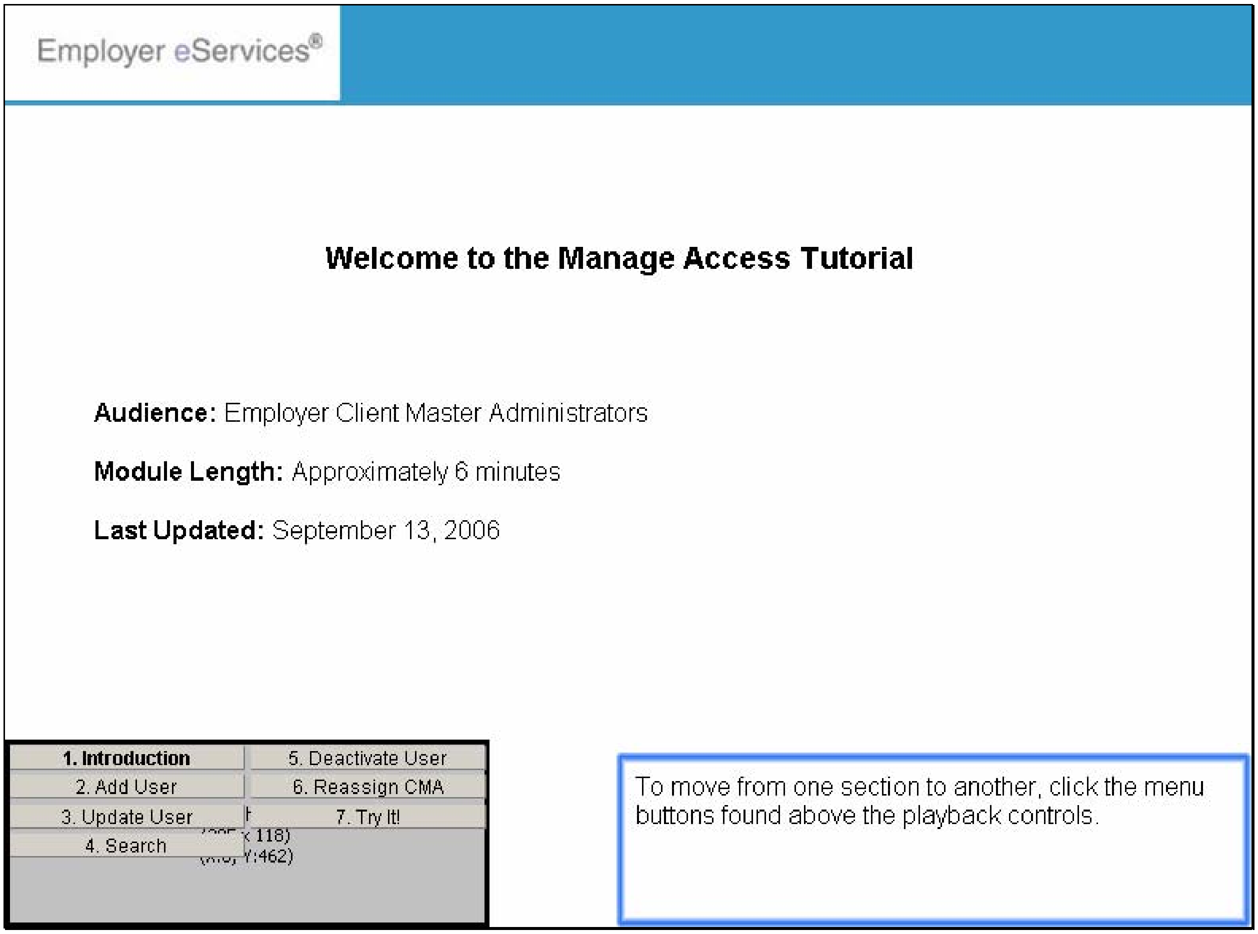
In this tutorial, you'll learn how to: add users, update profiles and permissions, search for user information, deactivate users, and reassign the Client Master Administrator role.

003



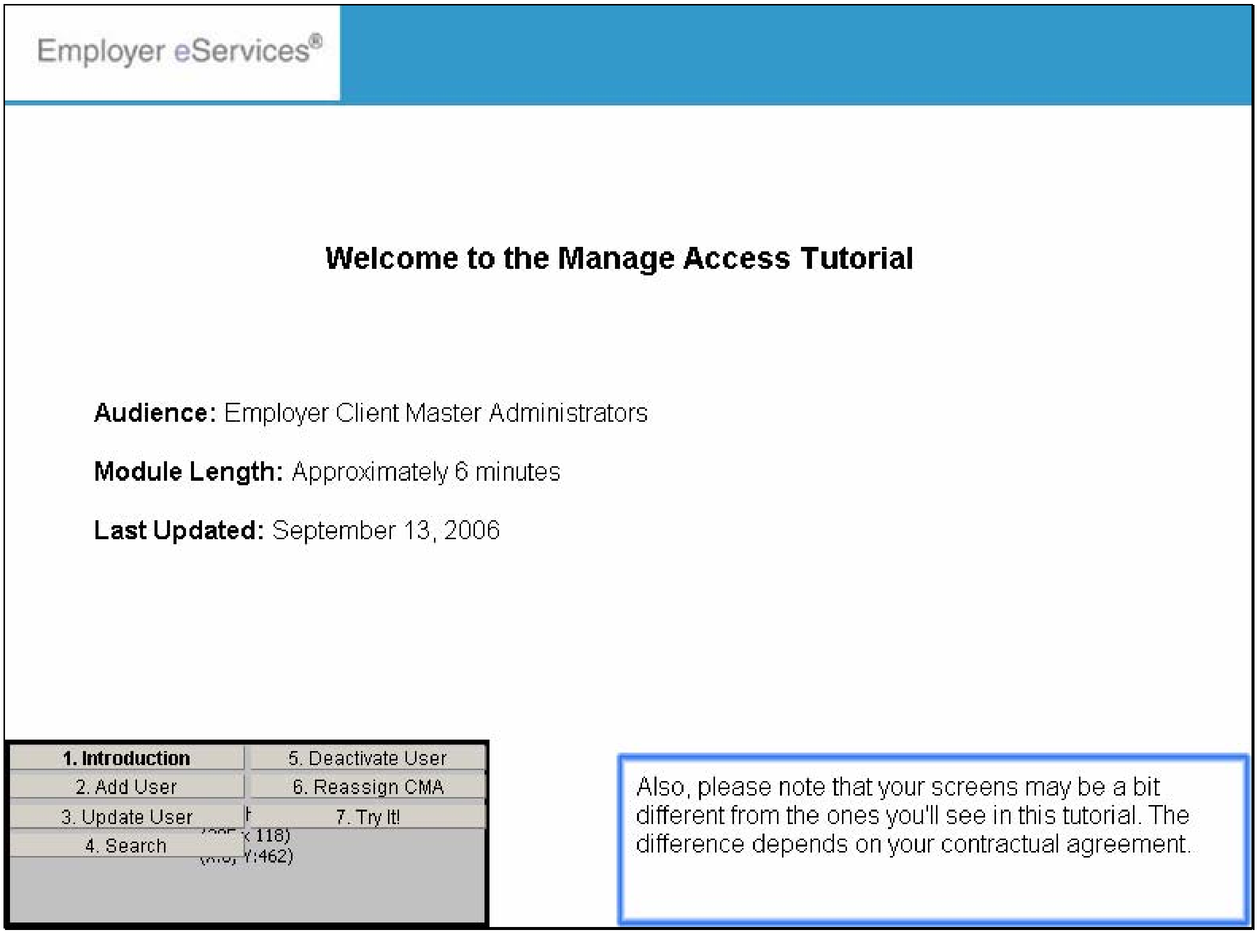
As you proceed, you may use the controls at the bottom of this window to rewind, pause, or skip ahead during playback.

004



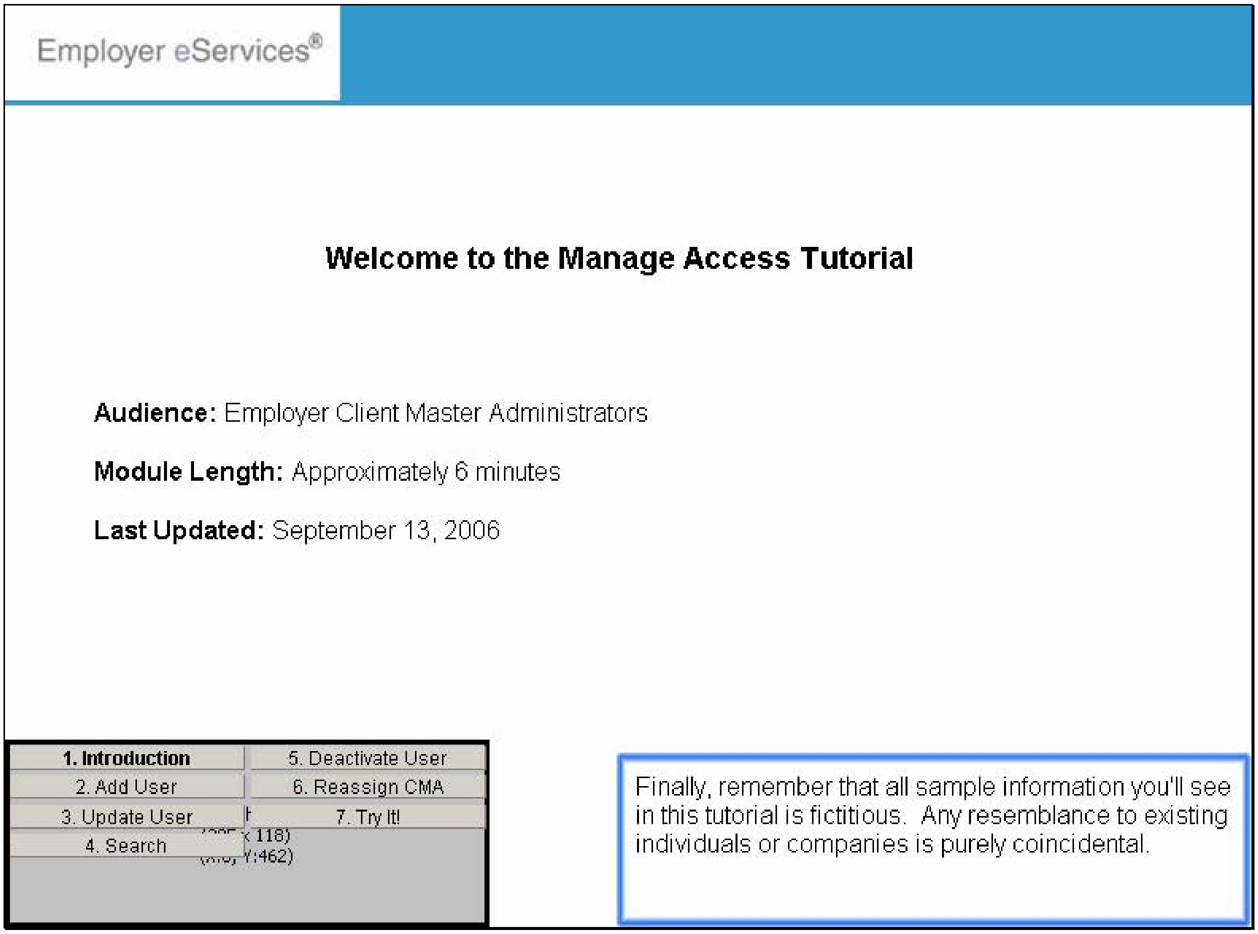
To move from one section to another, click the menu buttons found above the playback controls.

005



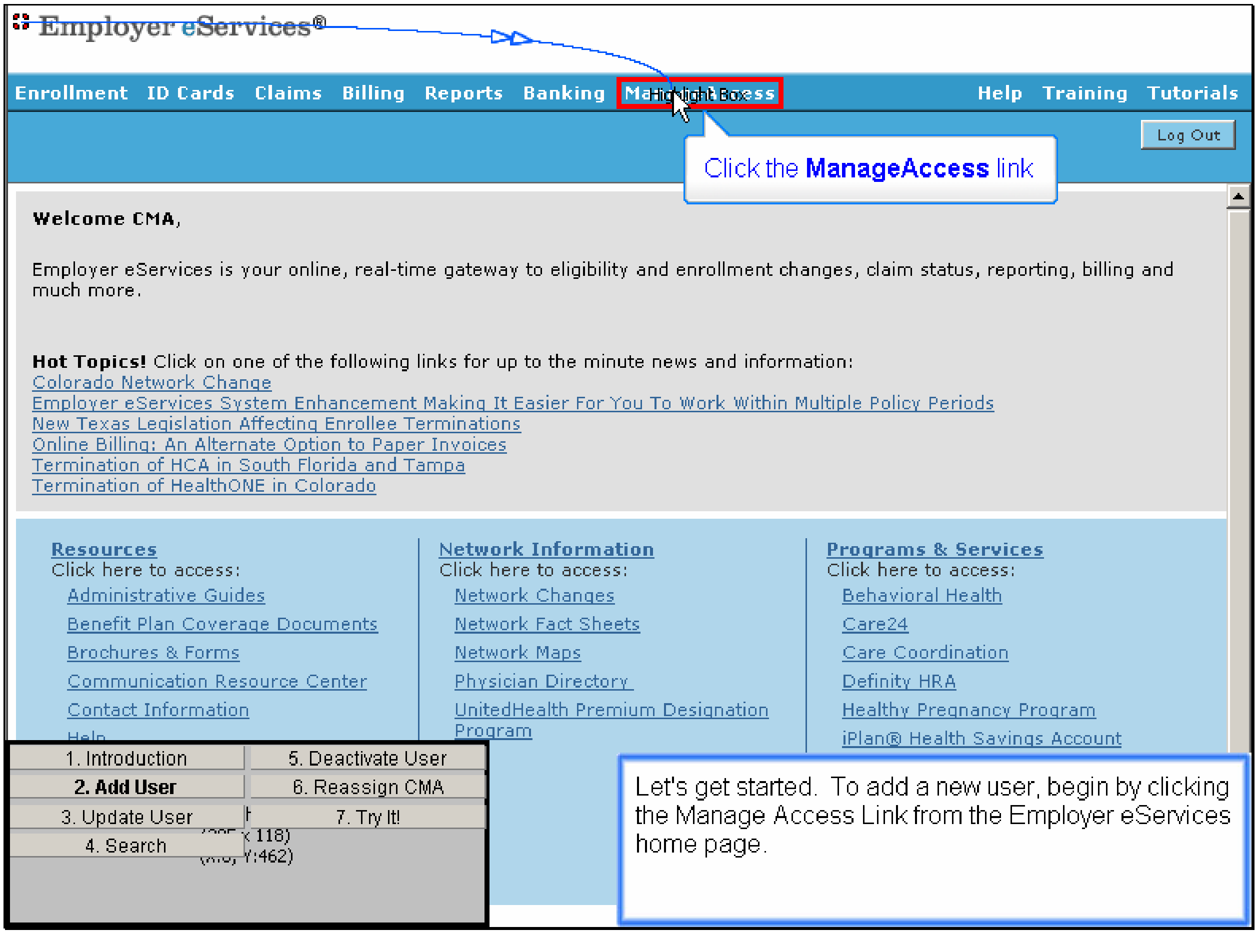
Also, please note that your screens may be a bit different from the ones you'll see in this tutorial. The difference depends on your contractual agreement.

006



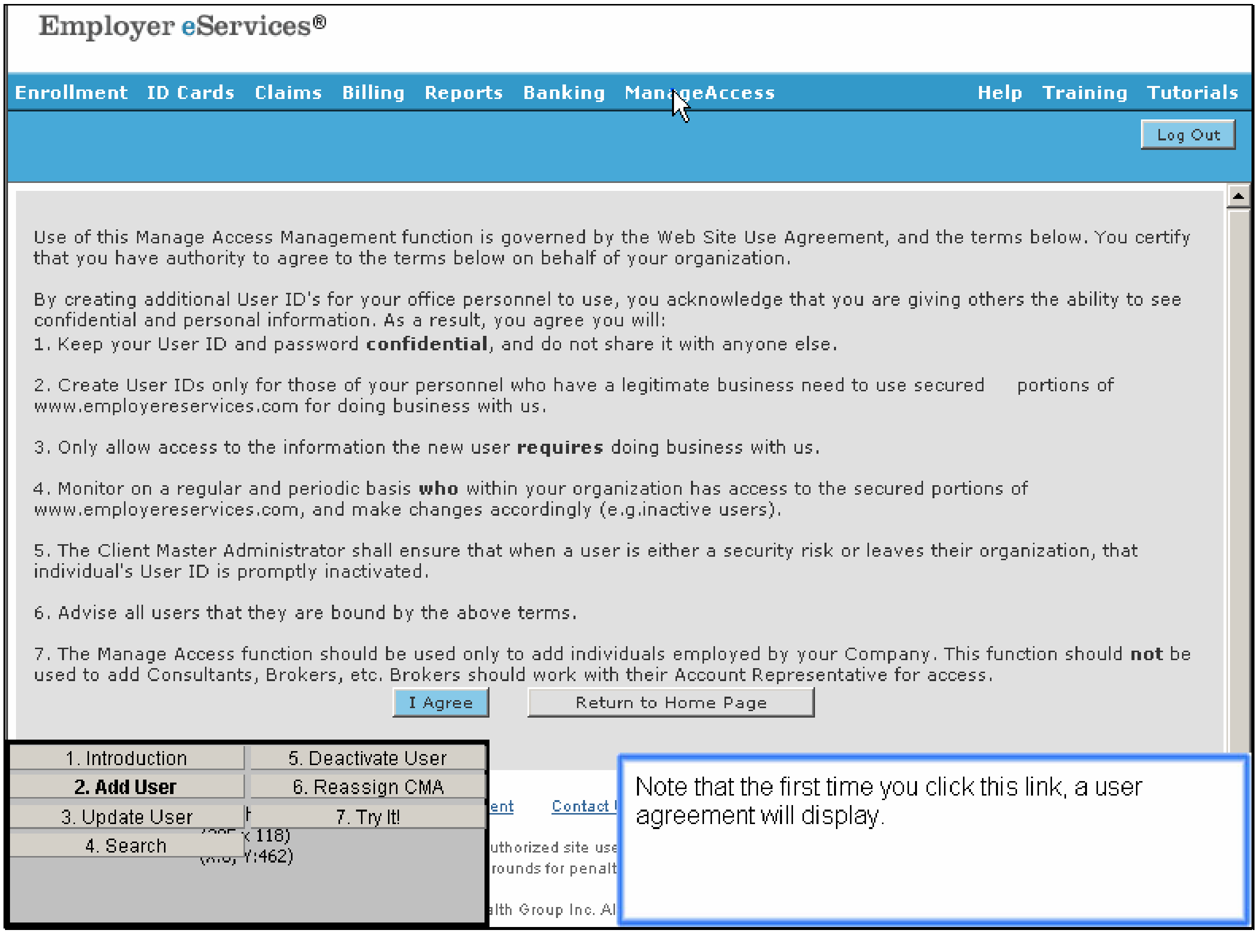
Finally, remember that all sample information you'll see in this tutorial is fictitious. Any resemblance to existing individuals or companies is purely coincidental.

007



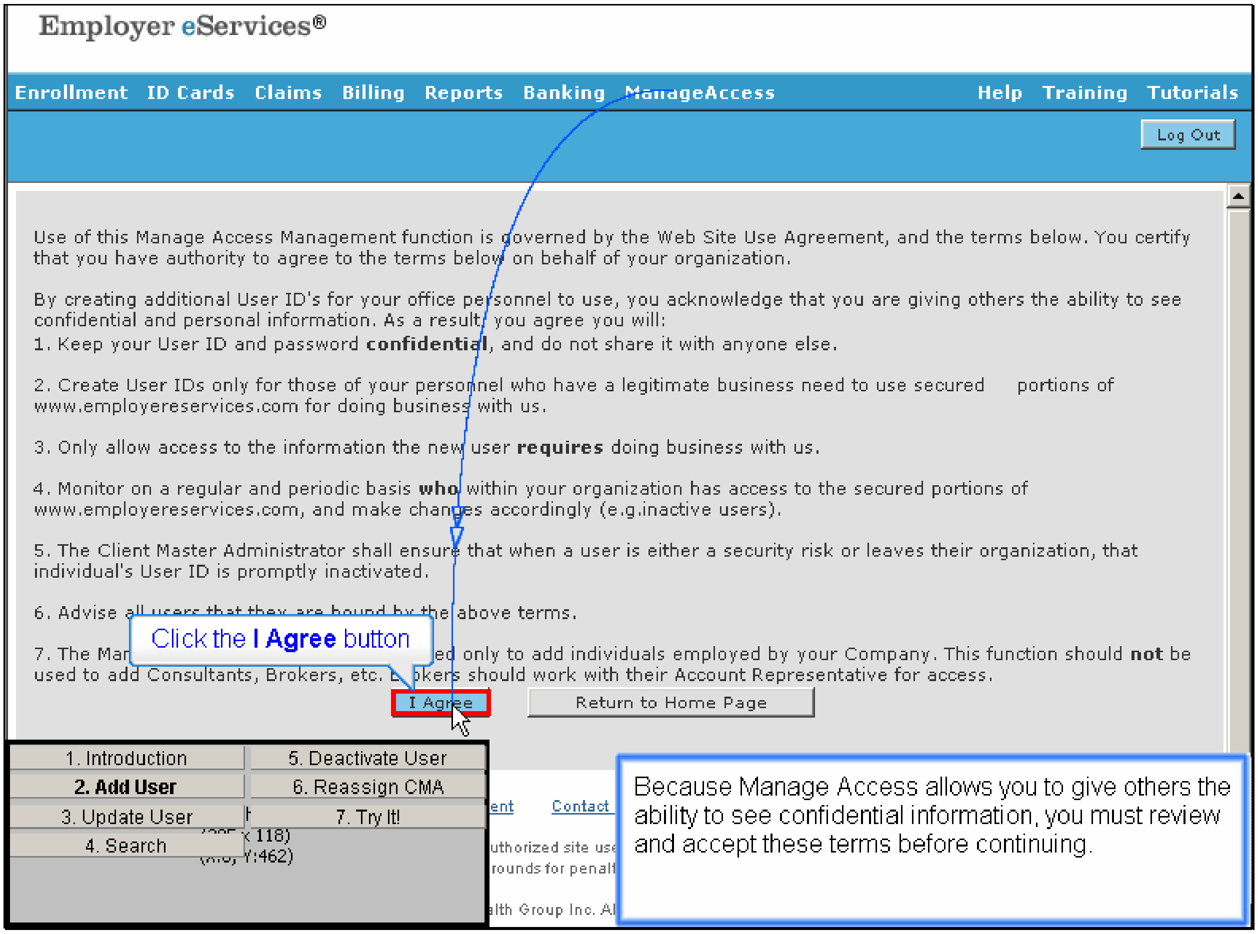
Let's get started. To add a new user, begin by clicking the Manage Access Link from the Employer eServices home page.

008



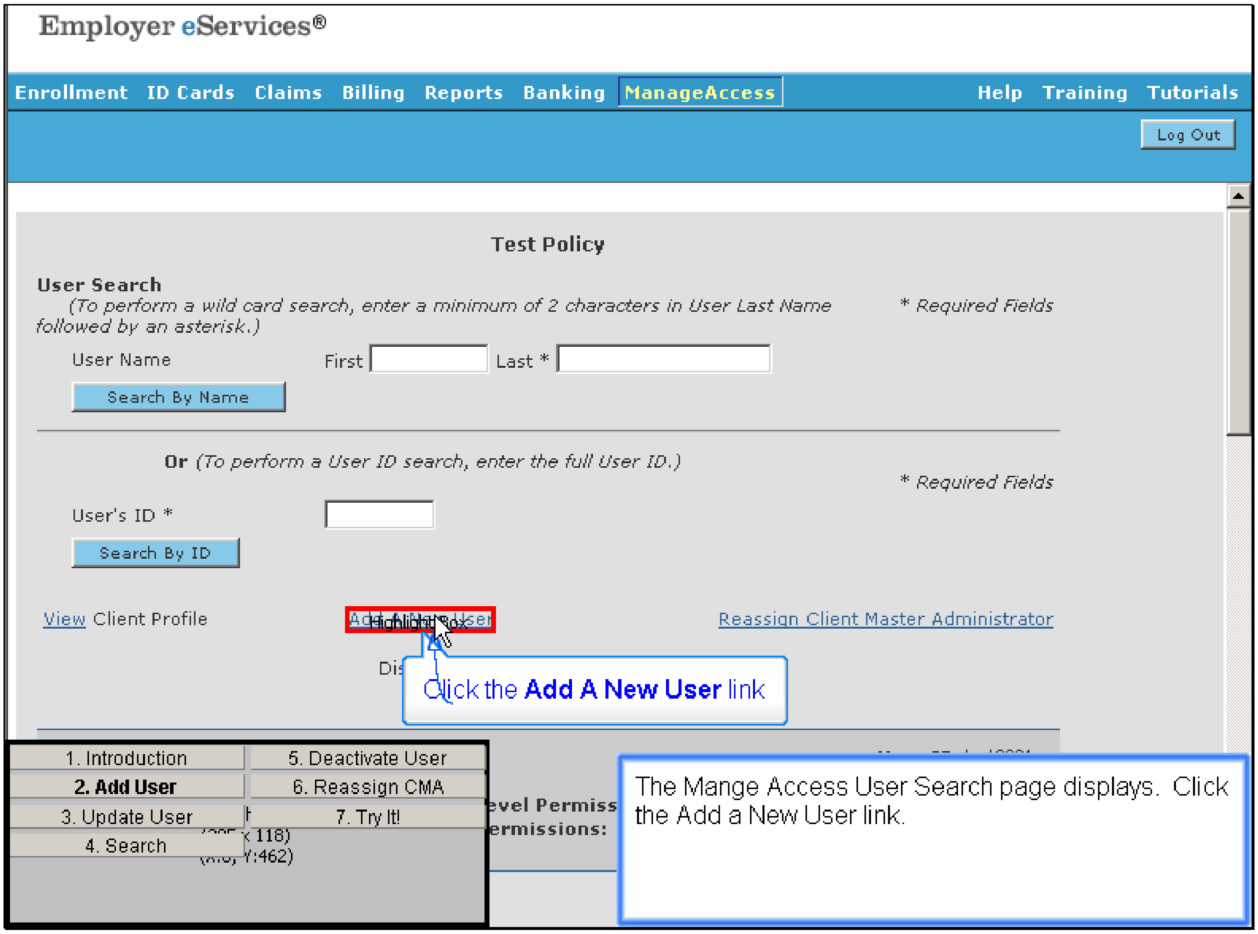
Note that the first time you click this link, a user agreement will display.

009



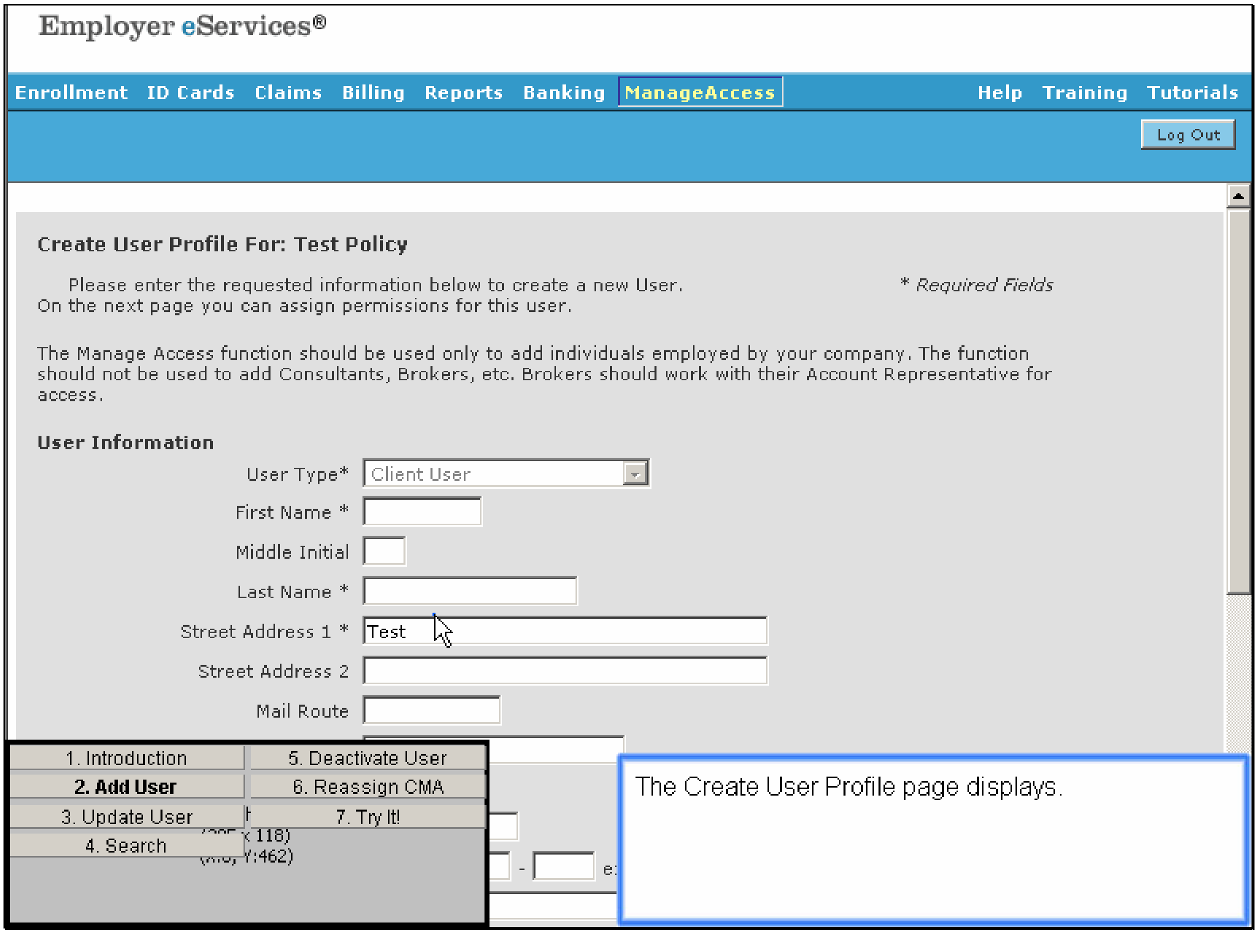
Because Manage Access allows you to give others the ability to see confidential information, you must review and accept these terms before continuing.

010



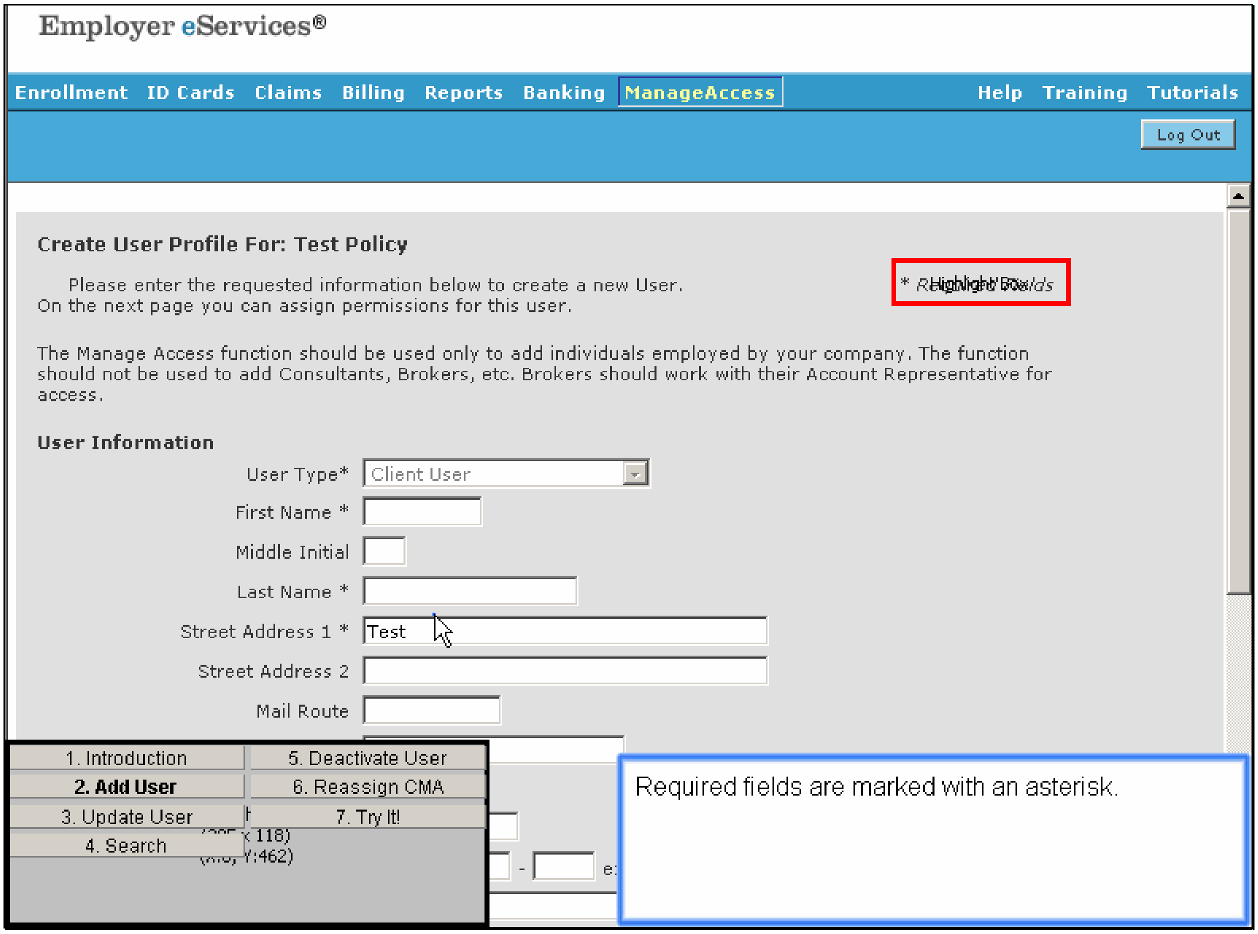
The Mange Access User Search page displays. Click the Add a New User link.

011



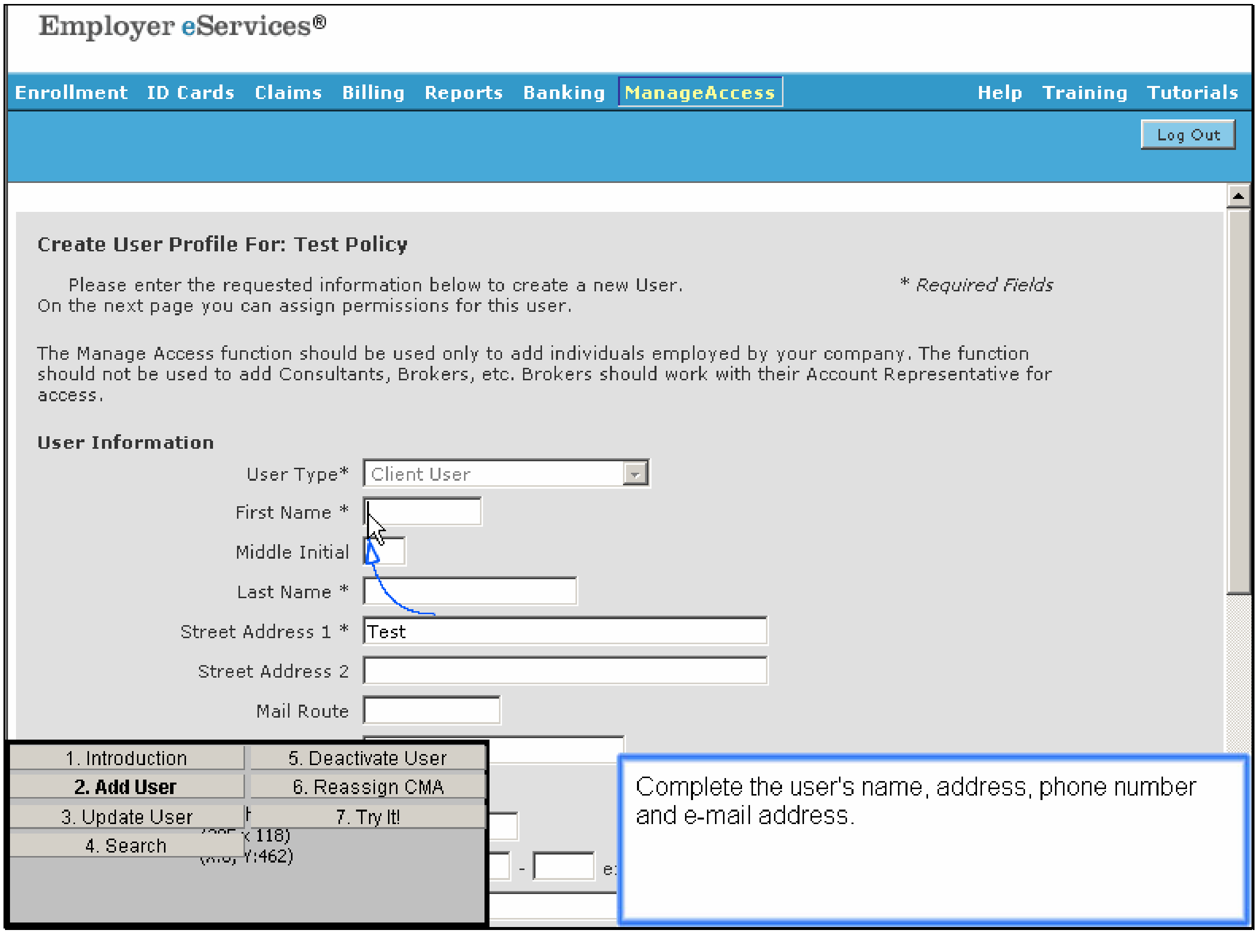
The Create User Profile page displays.

012



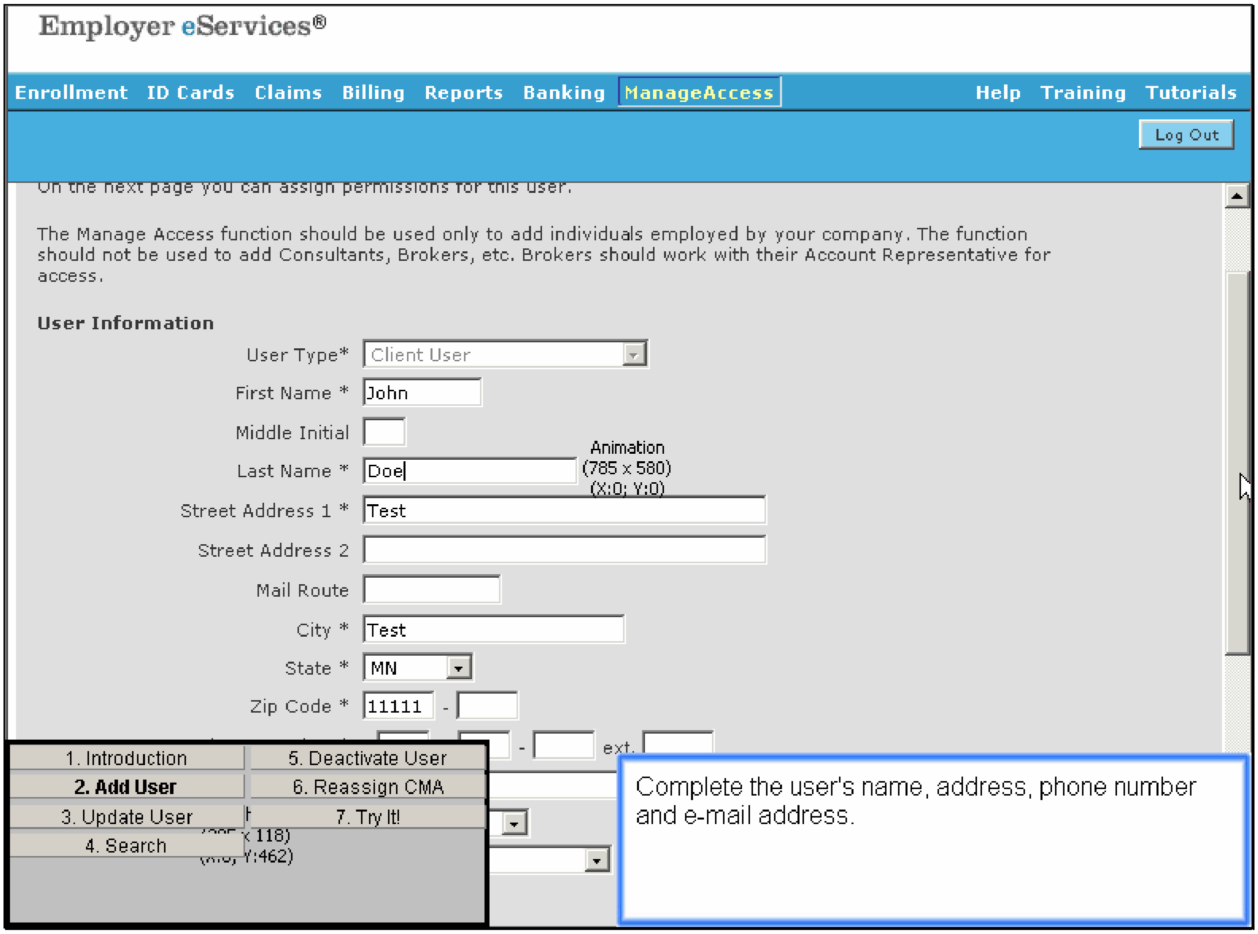
Required fields are marked with an asterisk.

013



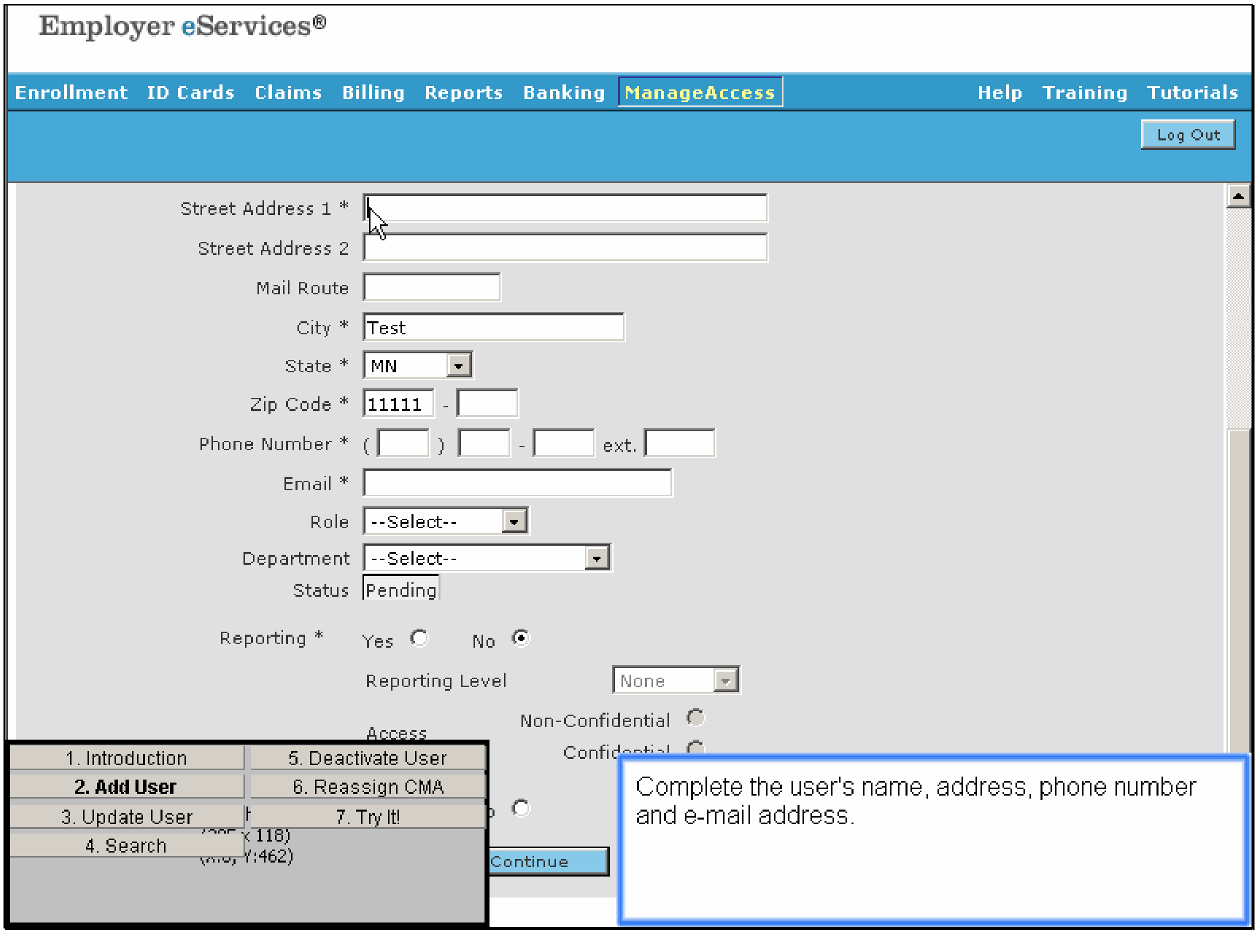
Complete the user's name, address, phone number and e-mail address.

014



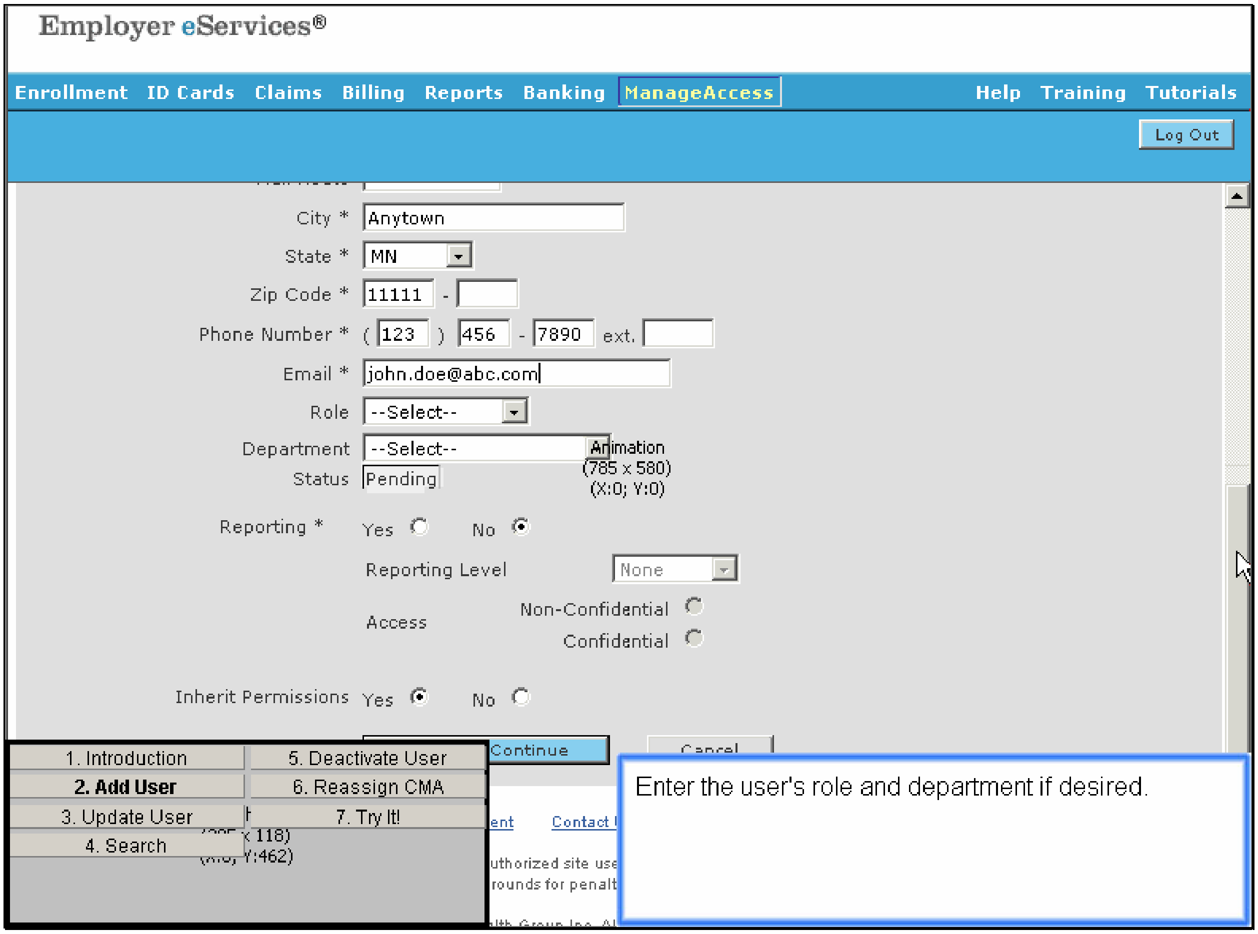
Complete the user's name, address, phone number and e-mail address.

015



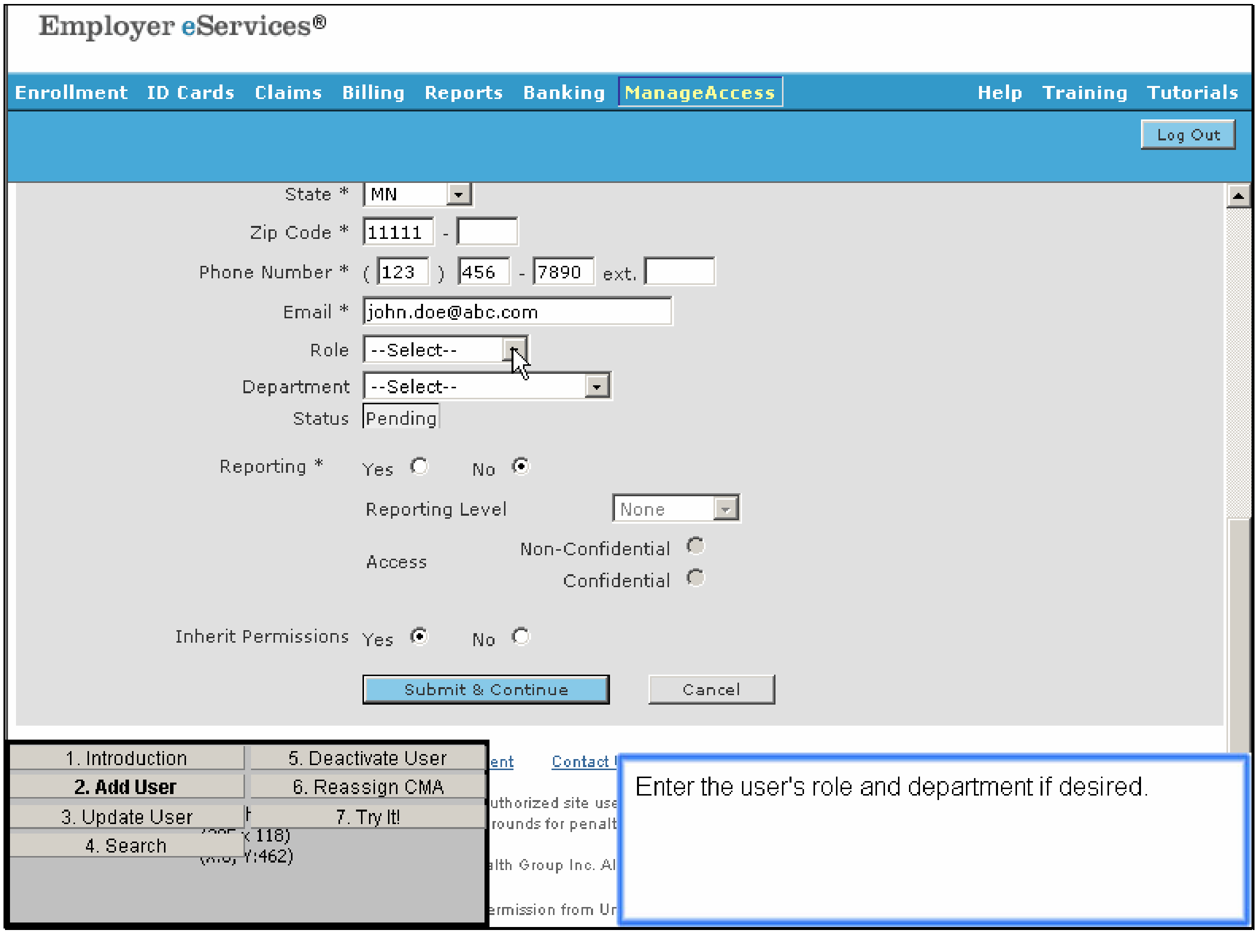
Complete the user's name, address, phone number and e-mail address.

016



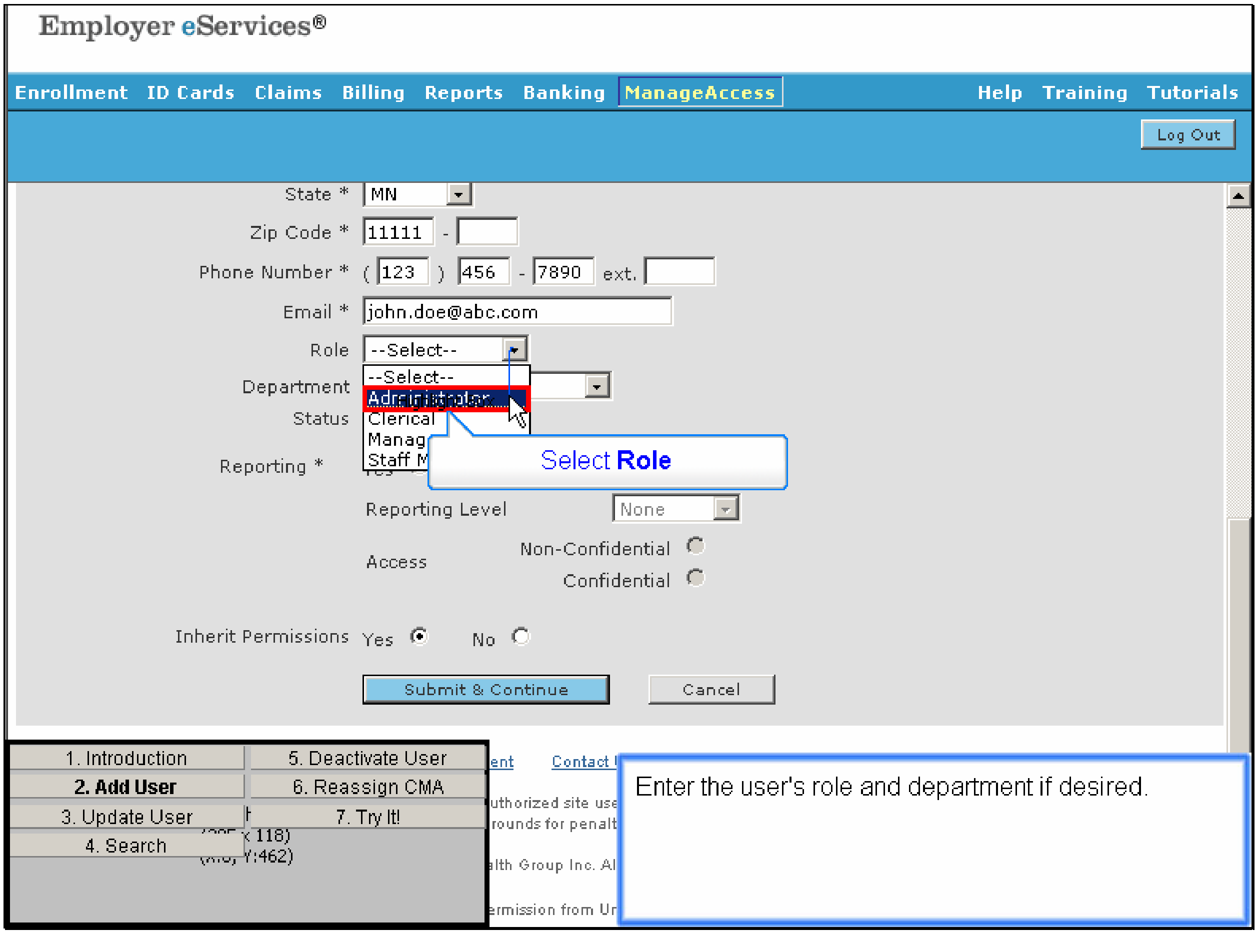
Enter the user's role and department if desired.

017



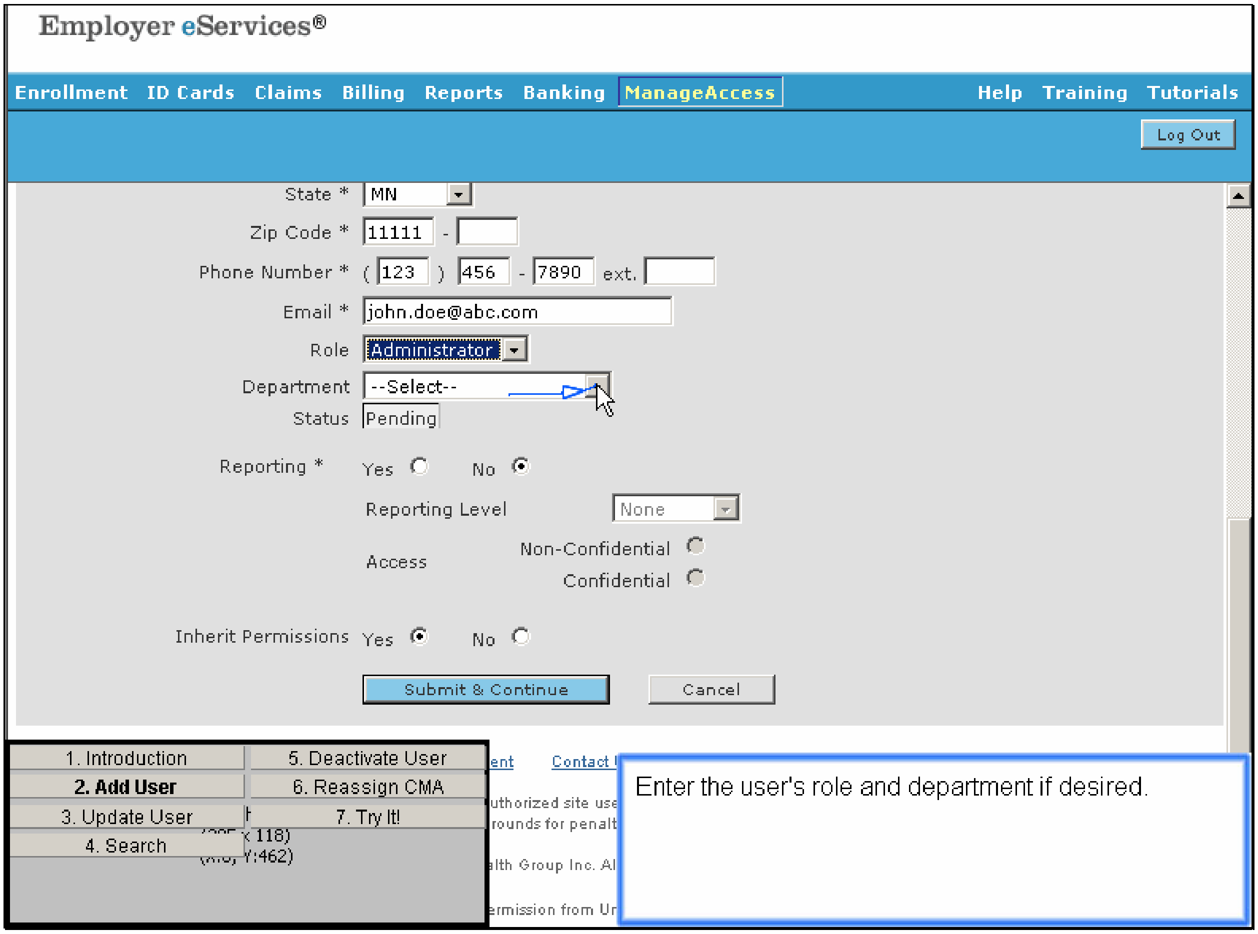
Enter the user's role and department if desired.

018



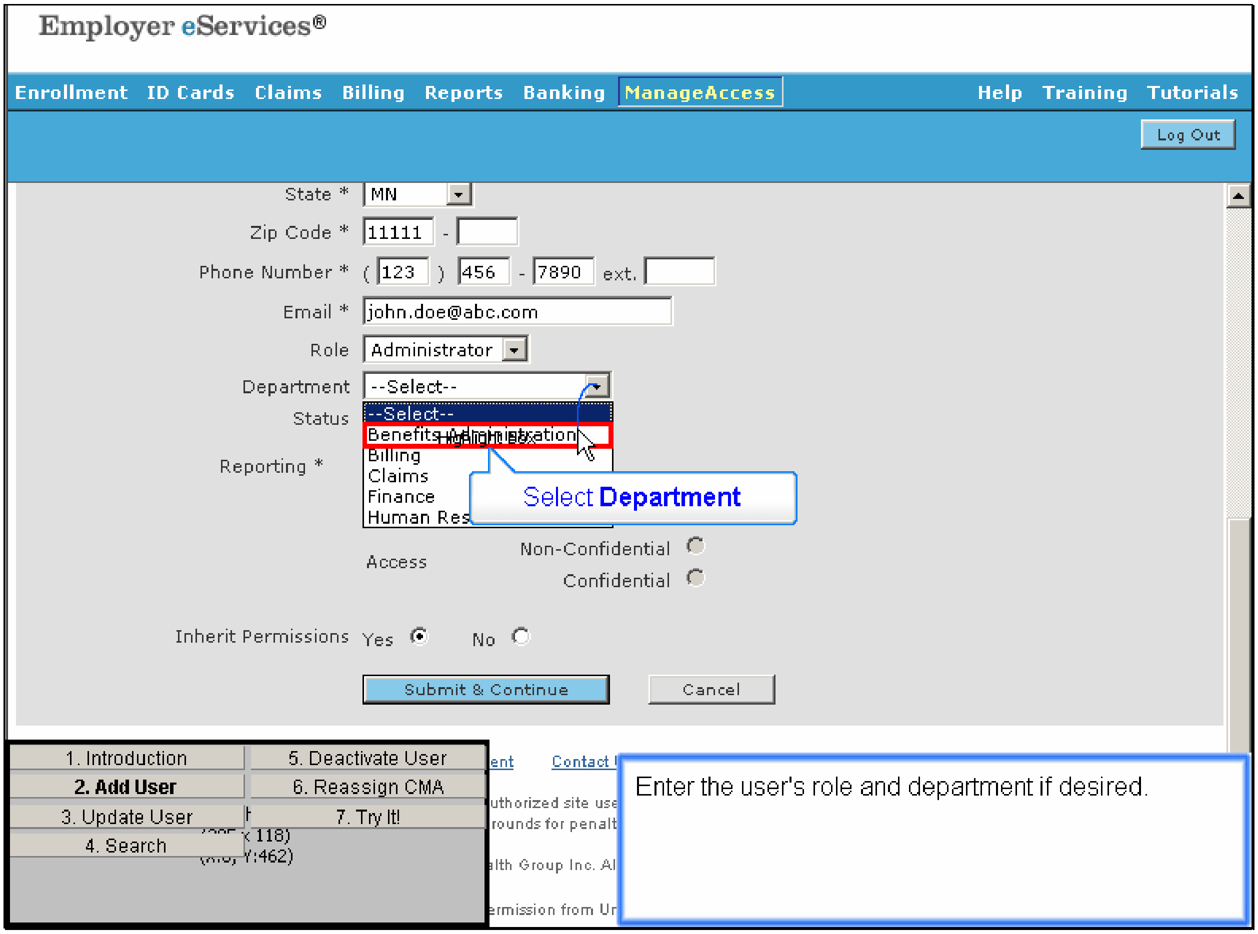
Enter the user's role and department if desired.

019



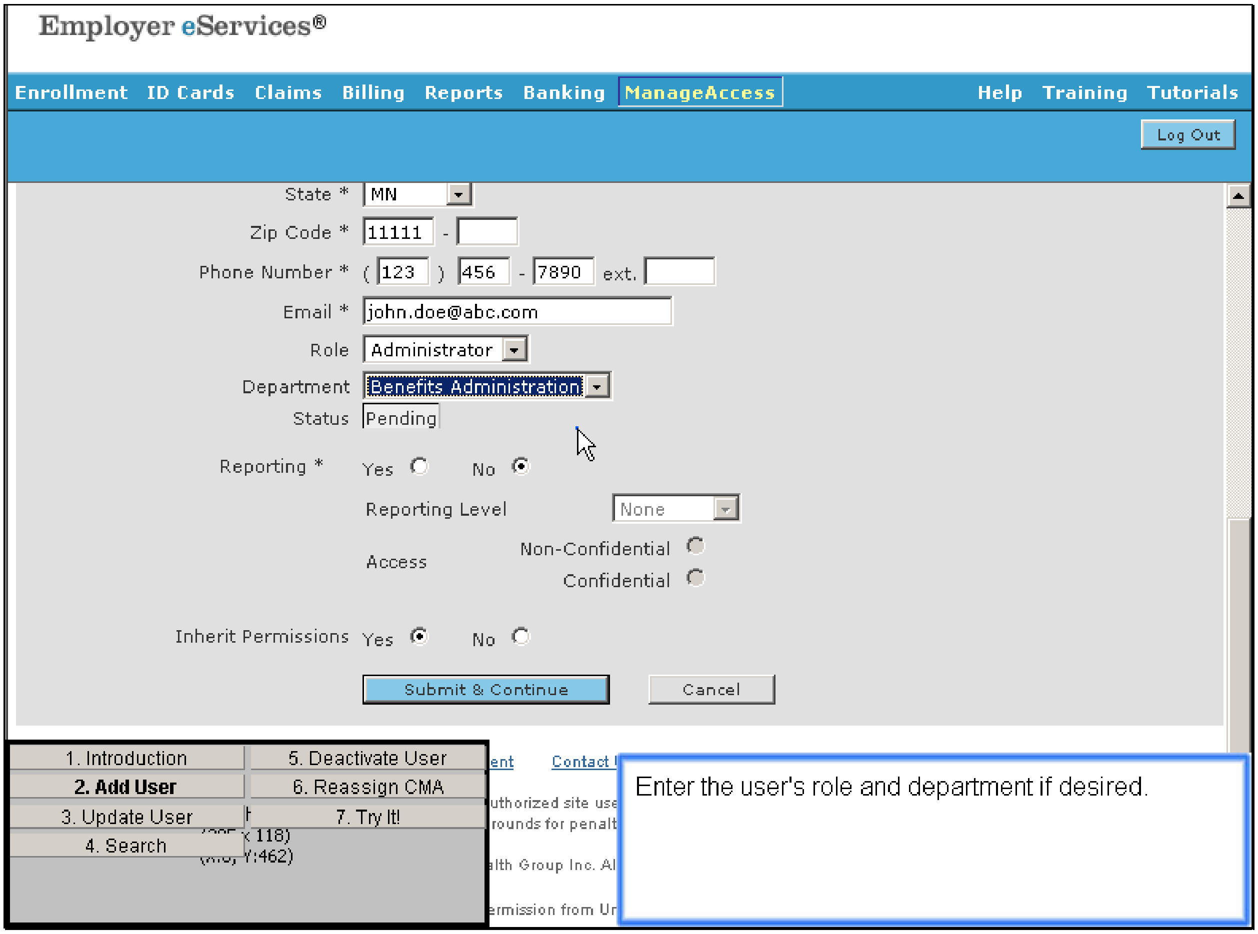
Enter the user's role and department if desired.

020



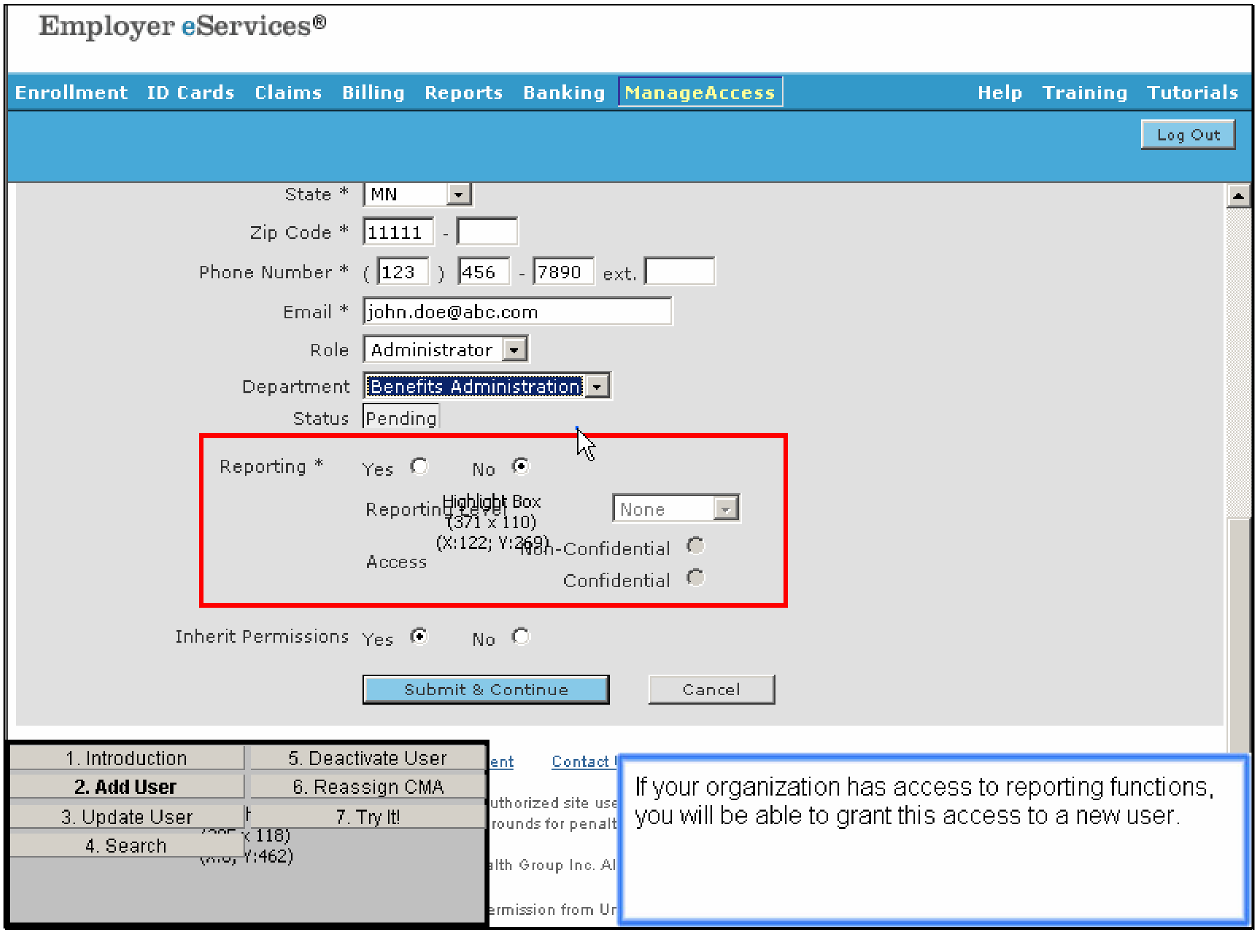
Enter the user's role and department if desired.

021



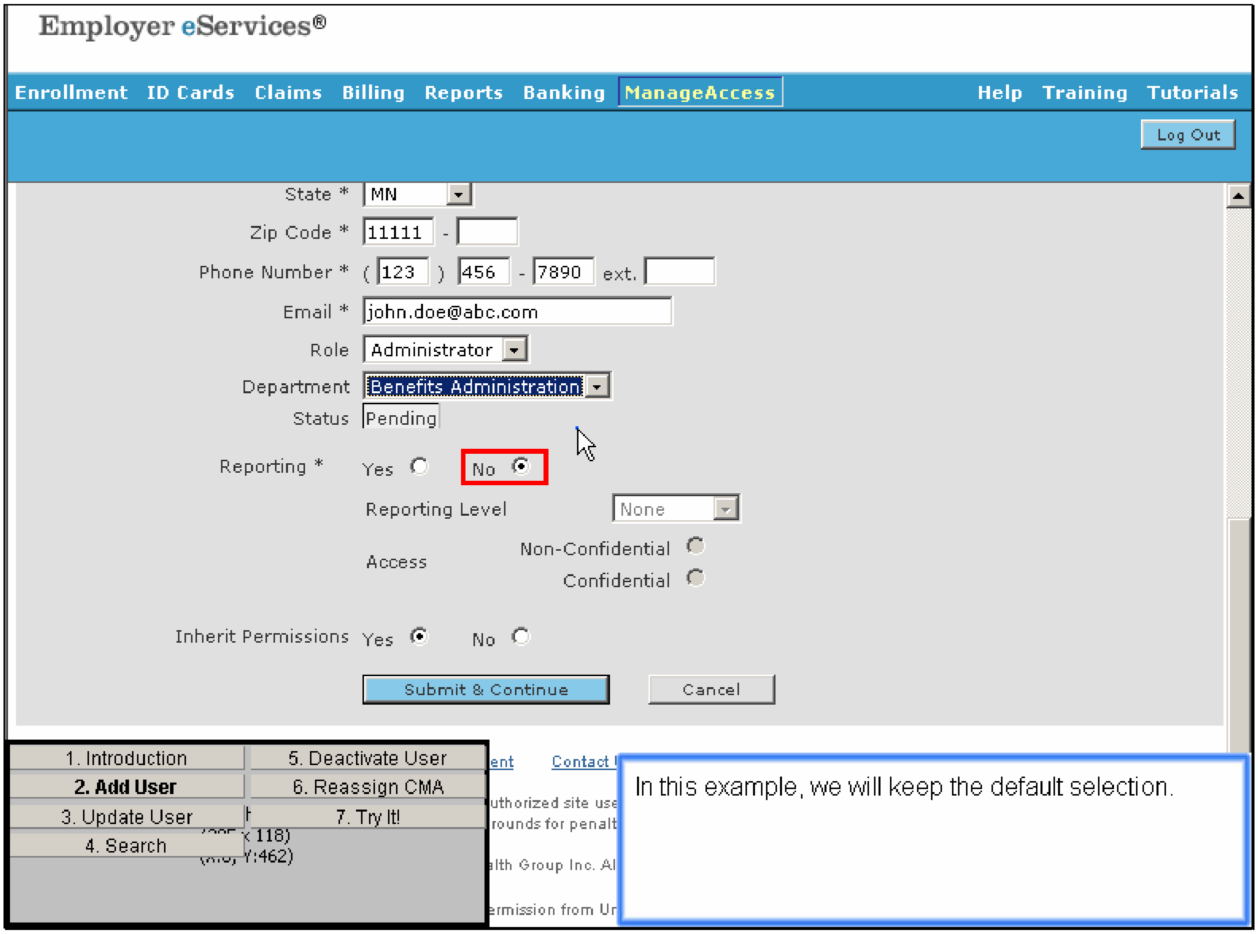
Enter the user's role and department if desired.

022



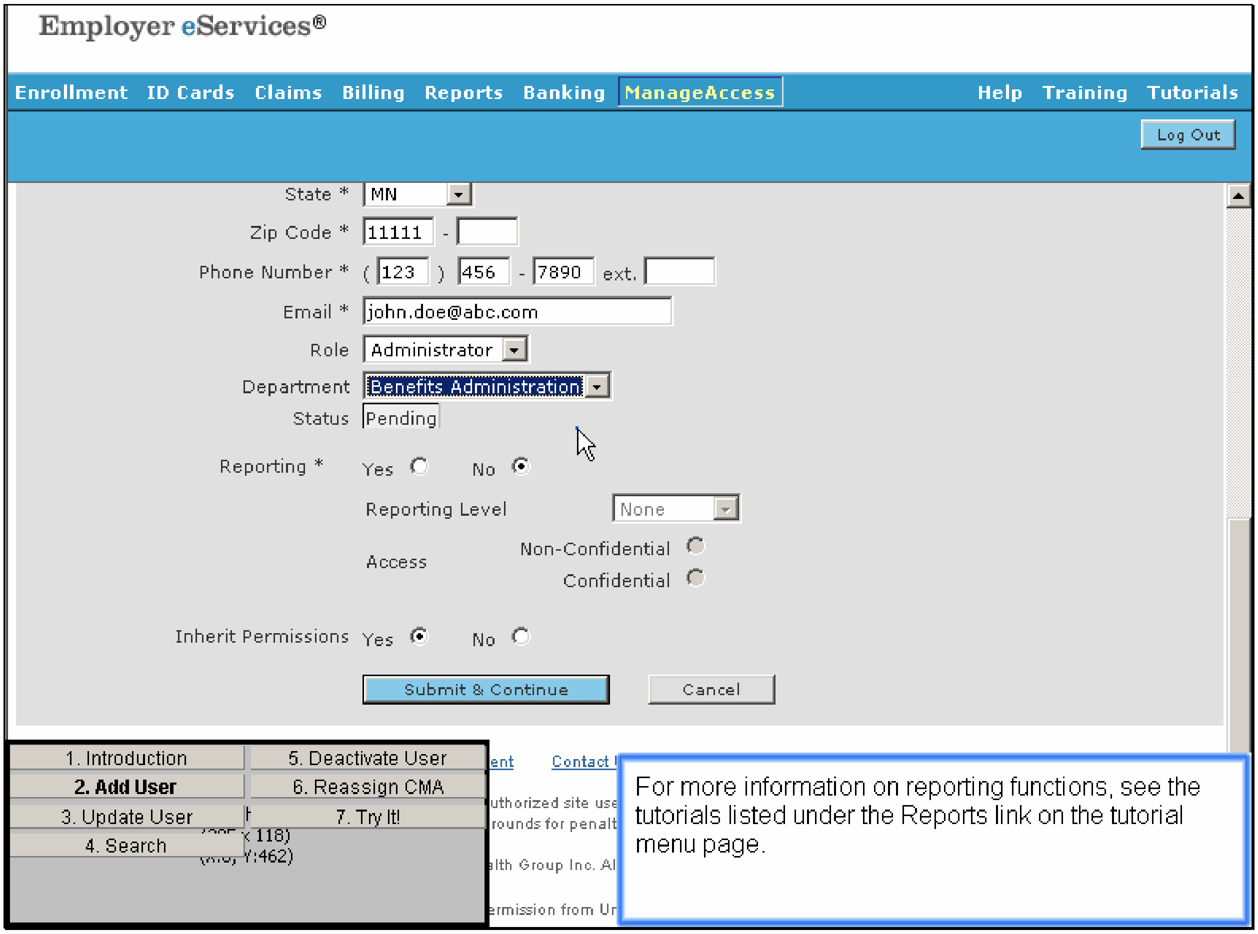
If your organization has access to reporting functions, you will be able to grant this access to a new user.

023



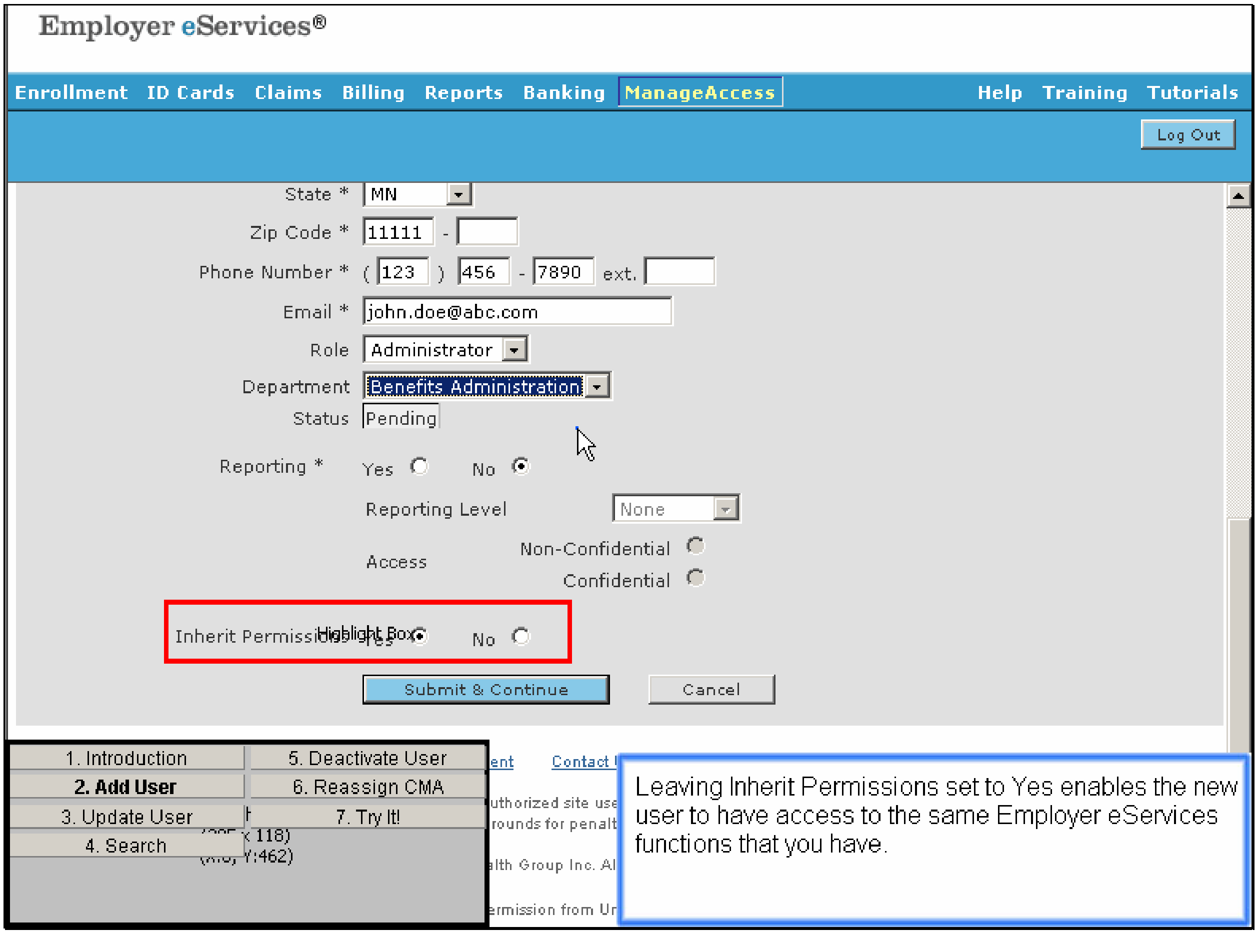
In this example, we will keep the default selection.

024



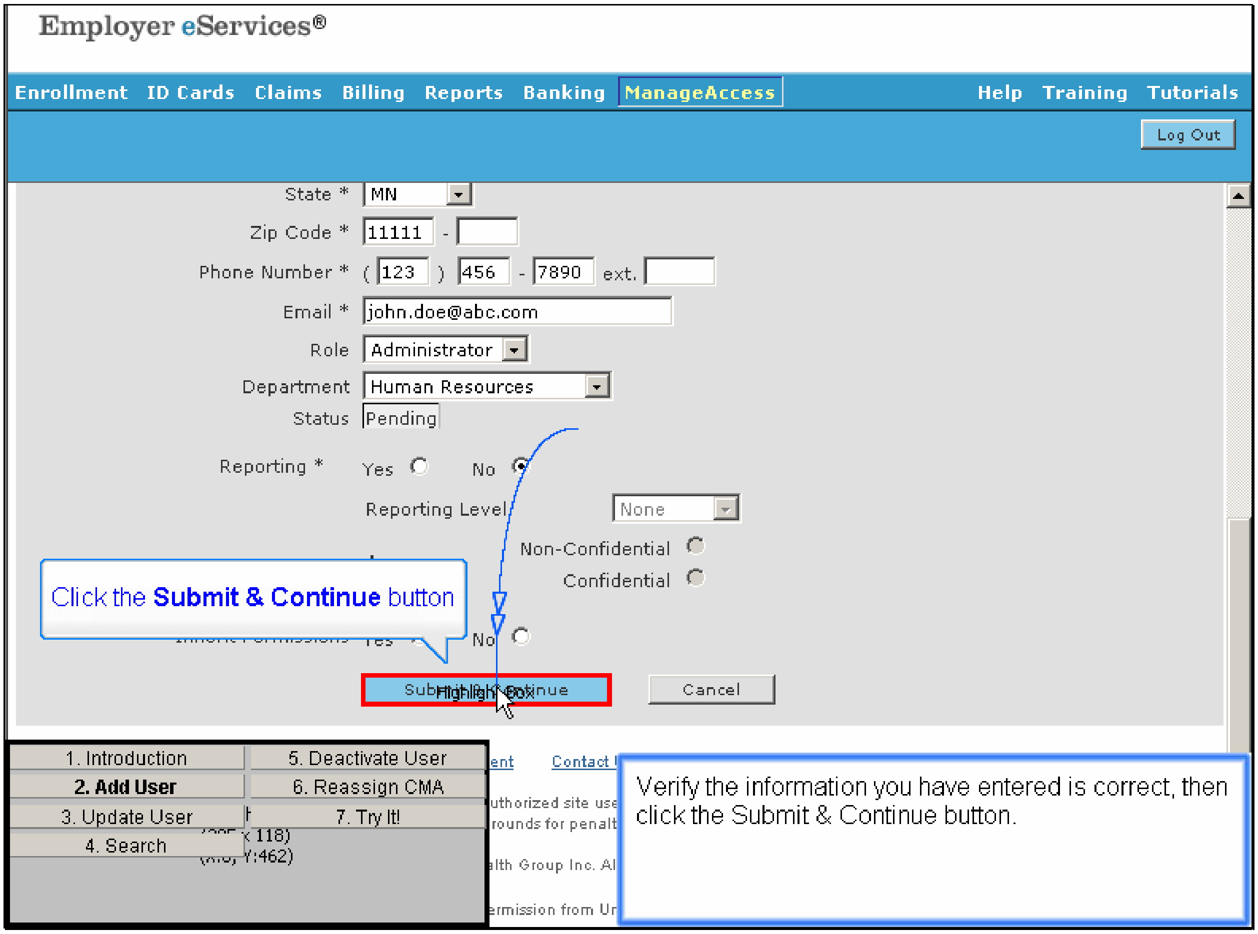
For more information on reporting functions, see the tutorials listed under the Reports link on the tutorial menu page.

025



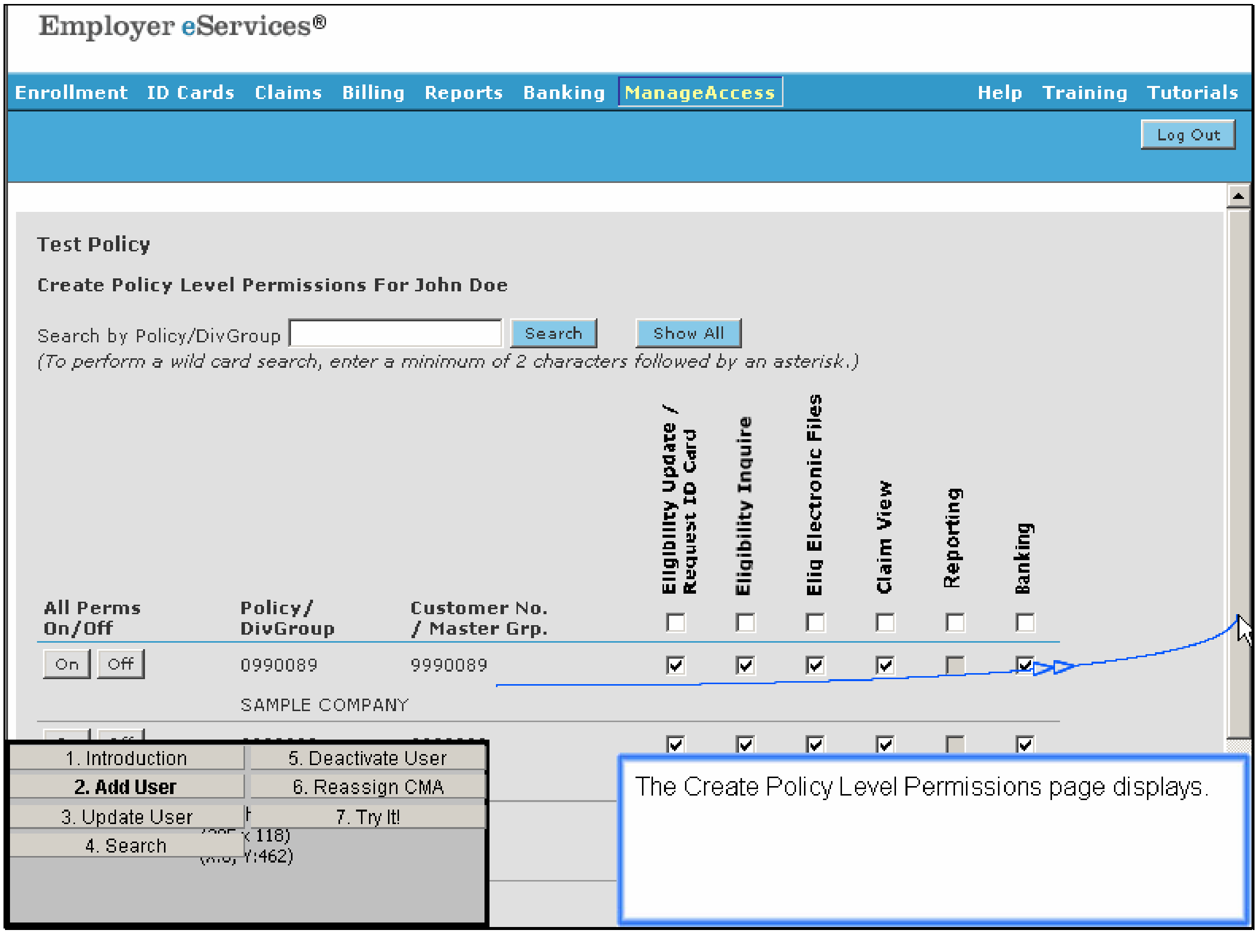
Leaving Inherit Permissions set to Yes enables the new user to have access to the same Employer eServices functions that you have.

026



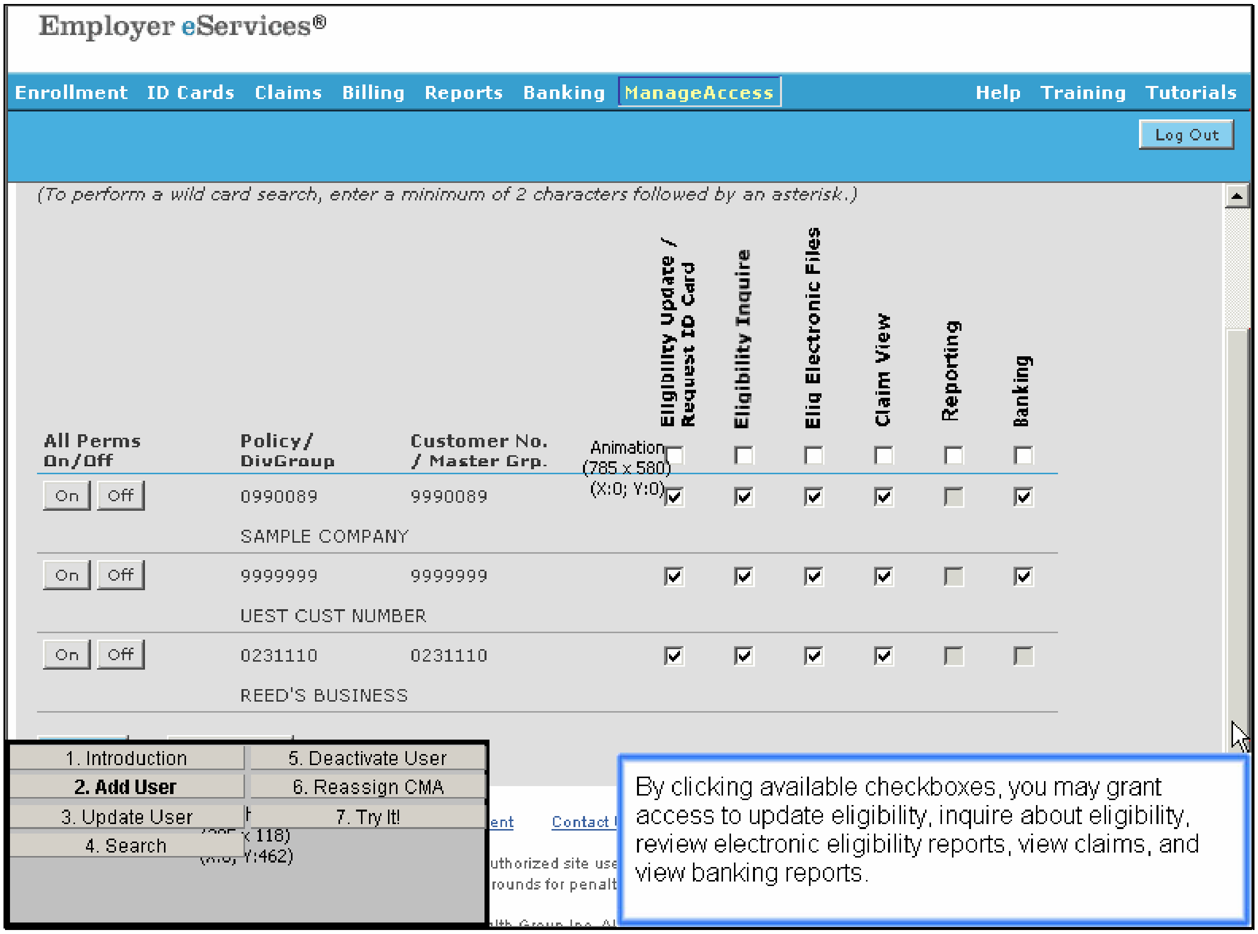
Verify the information you have entered is correct, then click the Submit & Continue button.

027



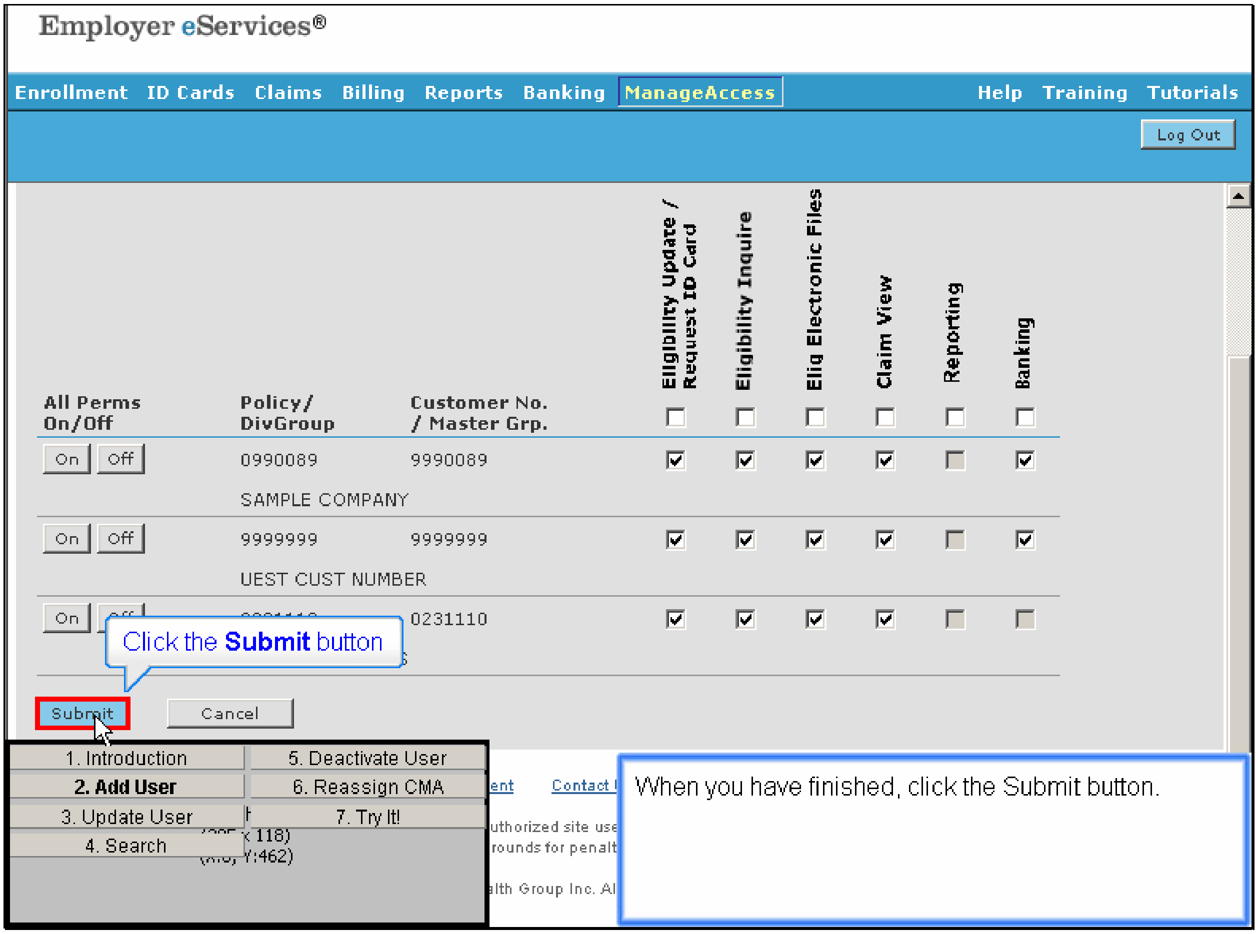
The Create Policy Level Permissions page displays.

028



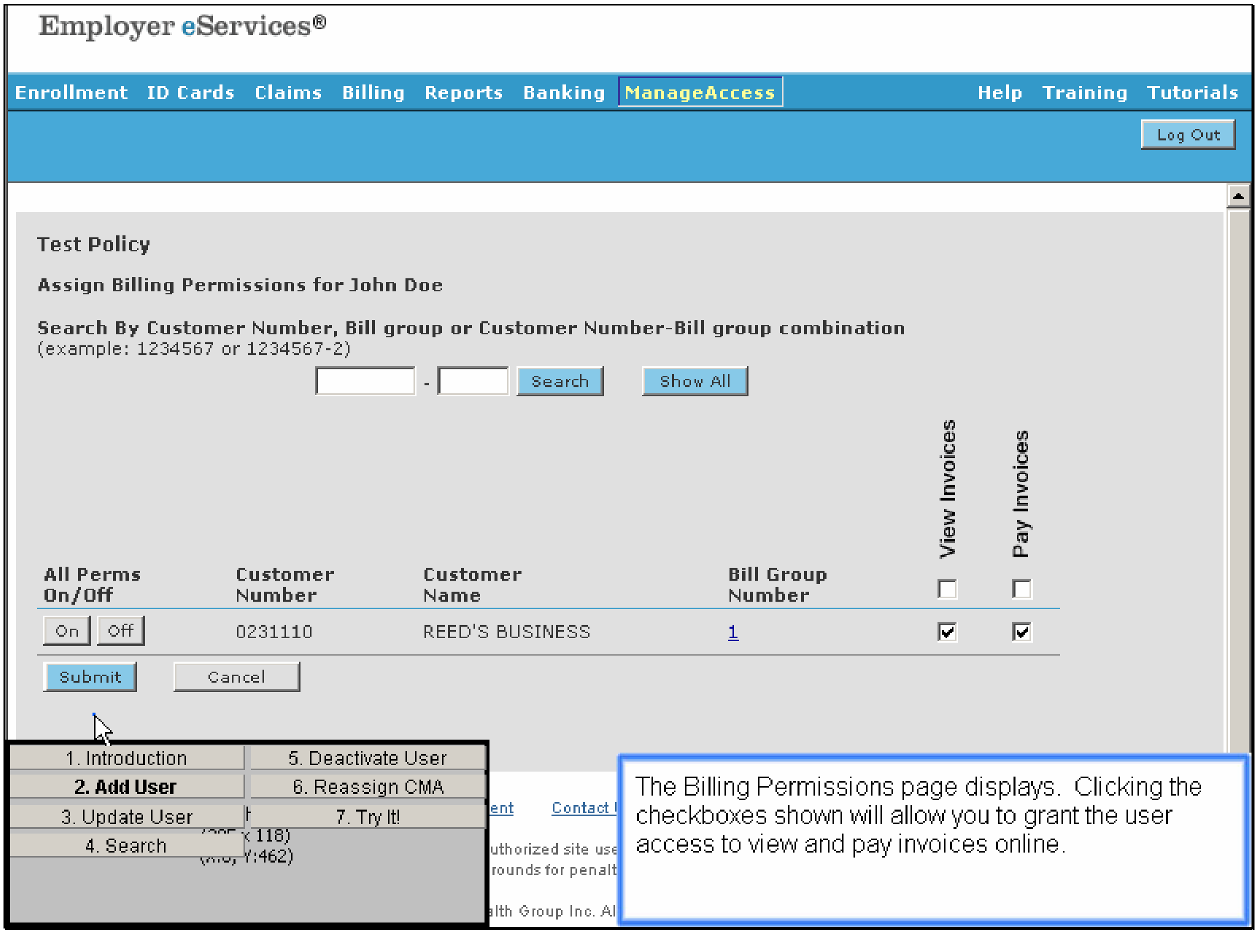
By clicking available checkboxes, you may grant access to update eligibility, inquire about eligibility, review electronic eligibility reports, view claims, and view banking reports.

029



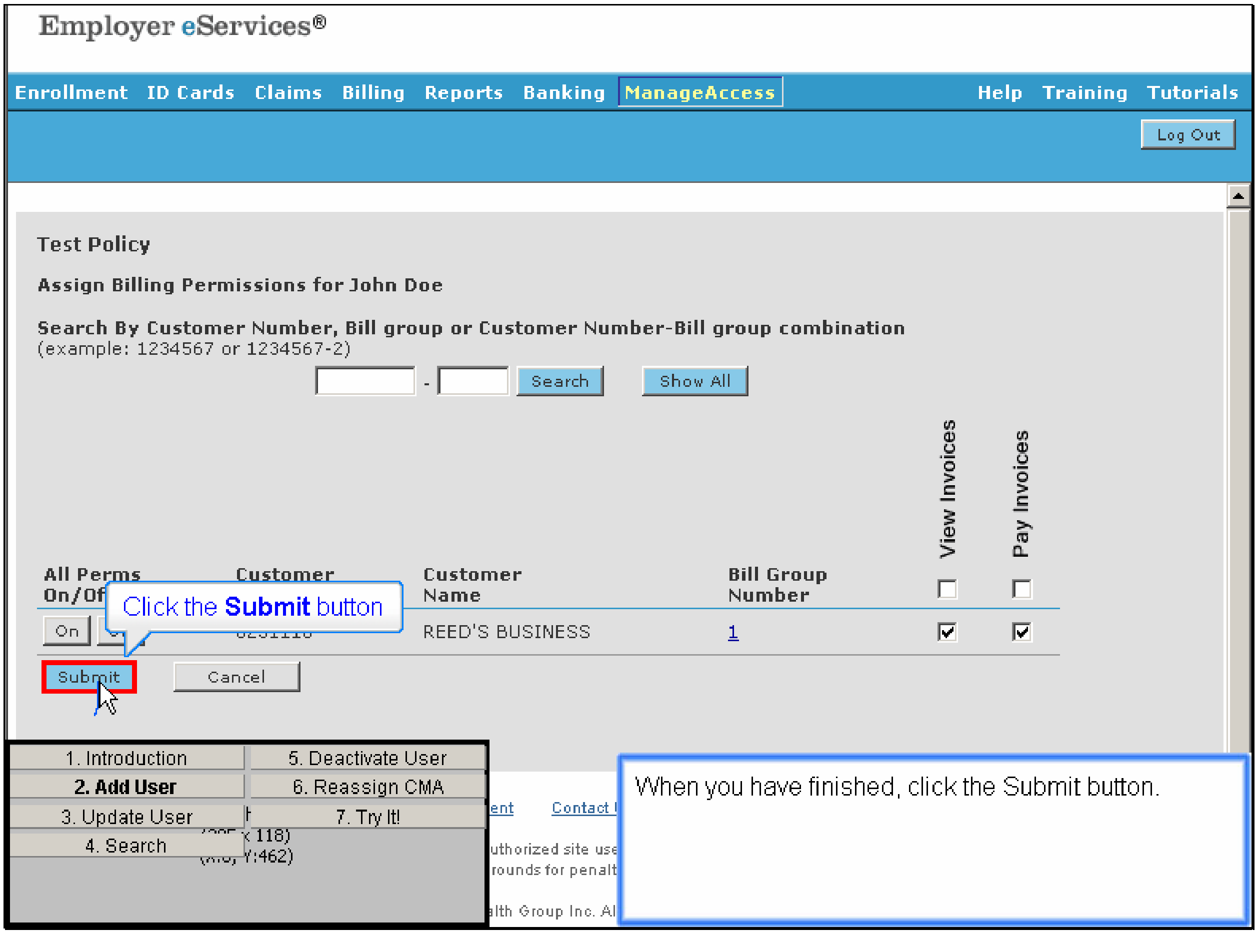
When you have finished, click the Submit button.

030



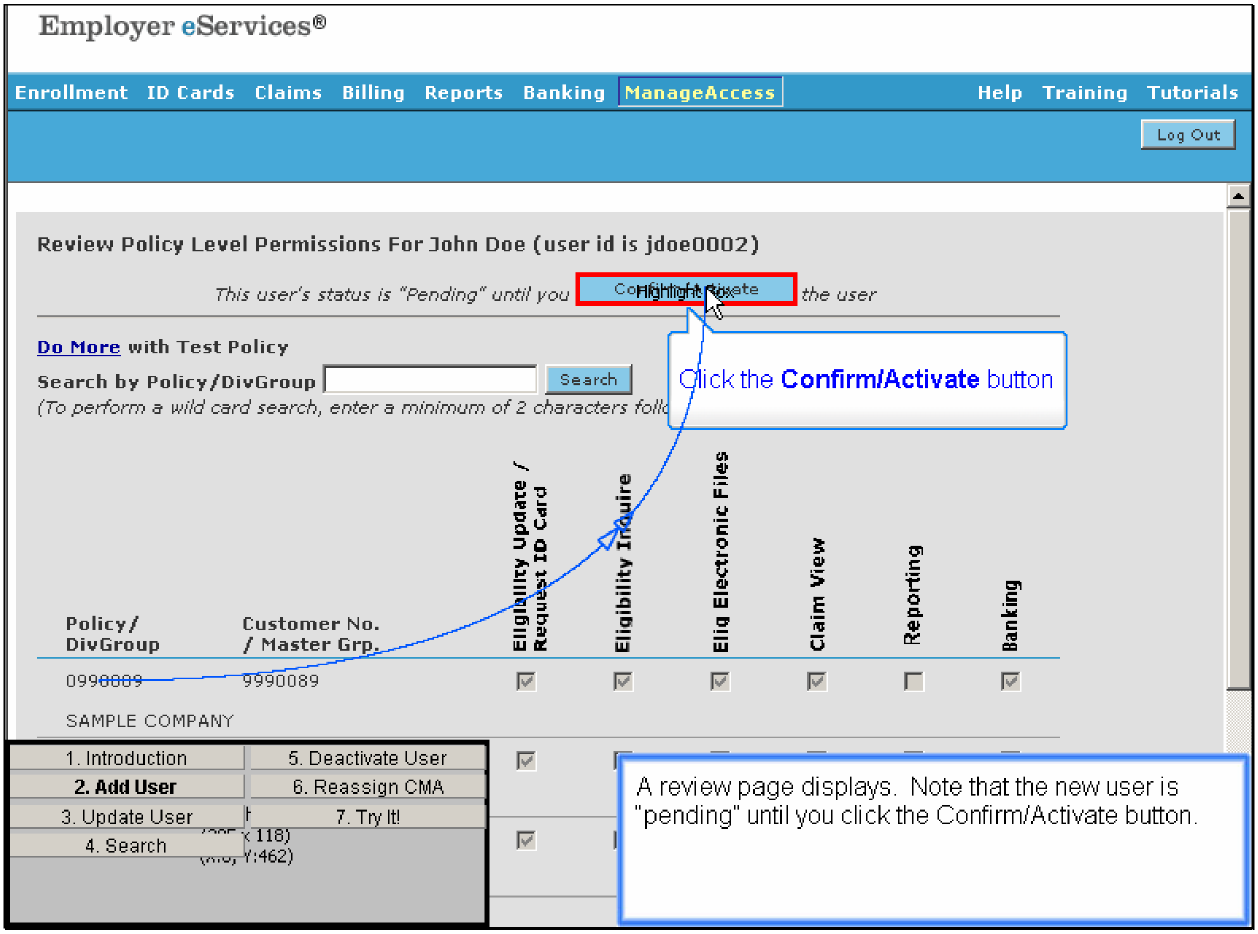
The Billing Permissions page displays. Clicking the checkboxes shown will allow you to grant the user access to view and pay invoices online.

031



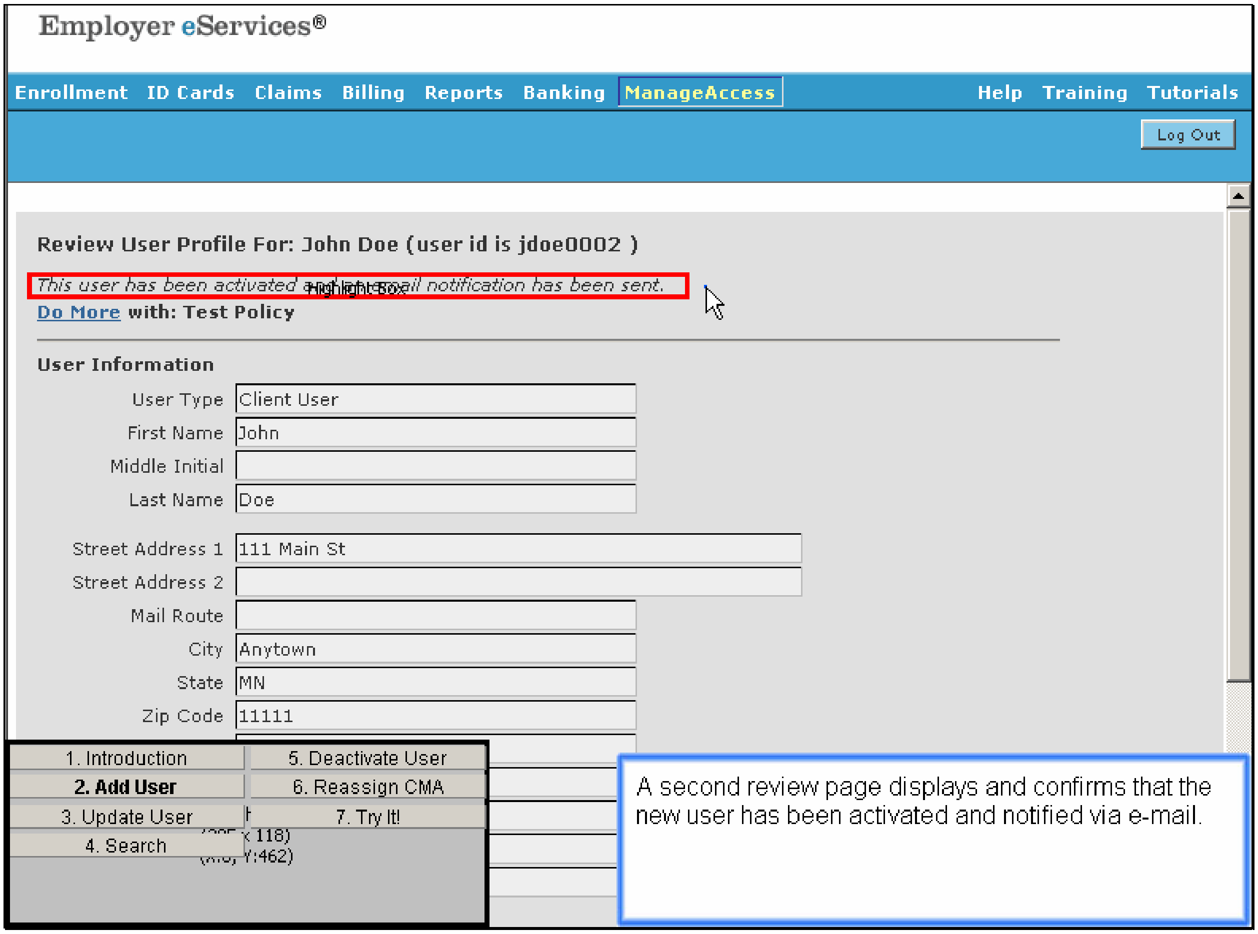
When you have finished, click the Submit button.

032



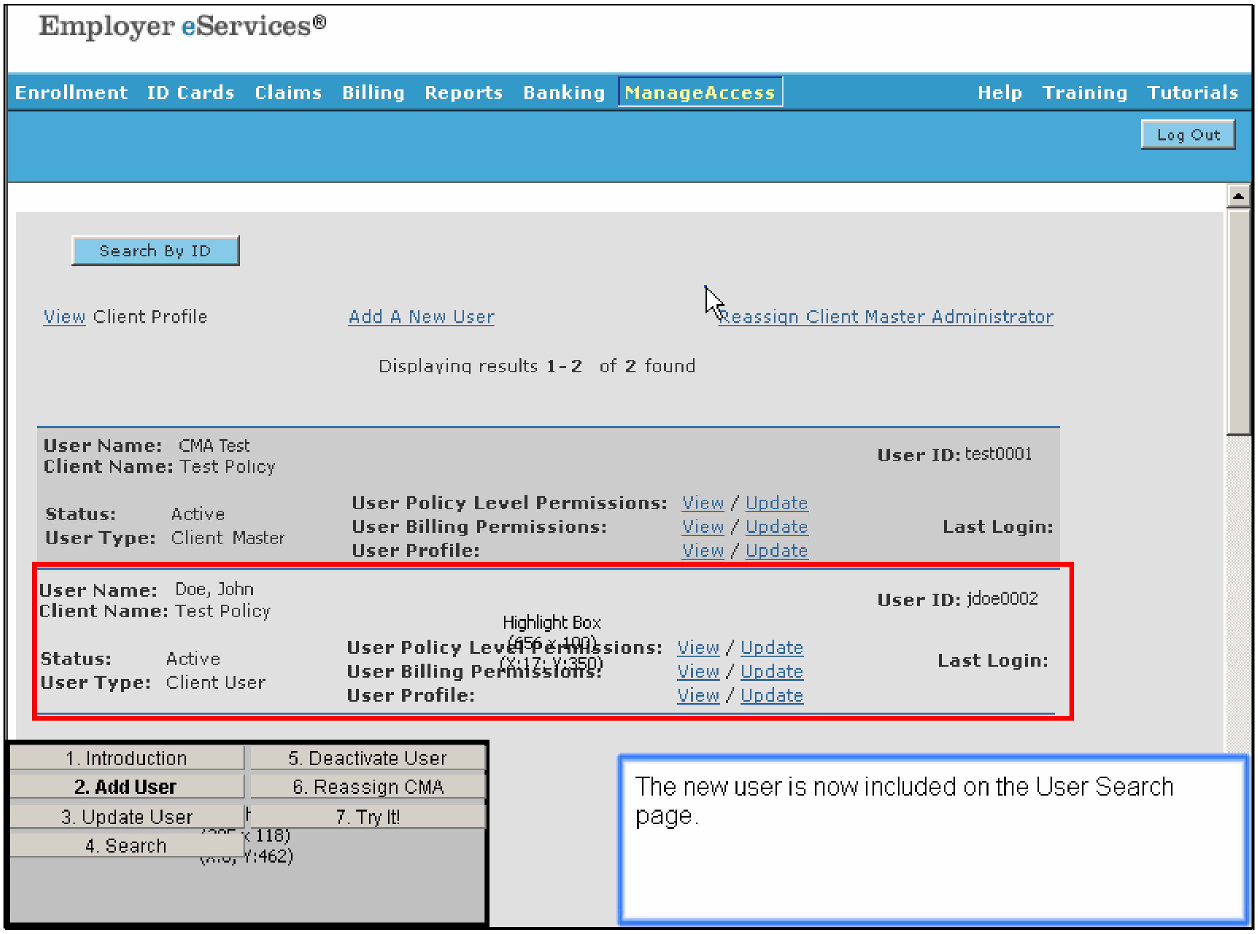
A review page displays. Note that the new user is "pending" until you click the Confirm/Activate button.

033



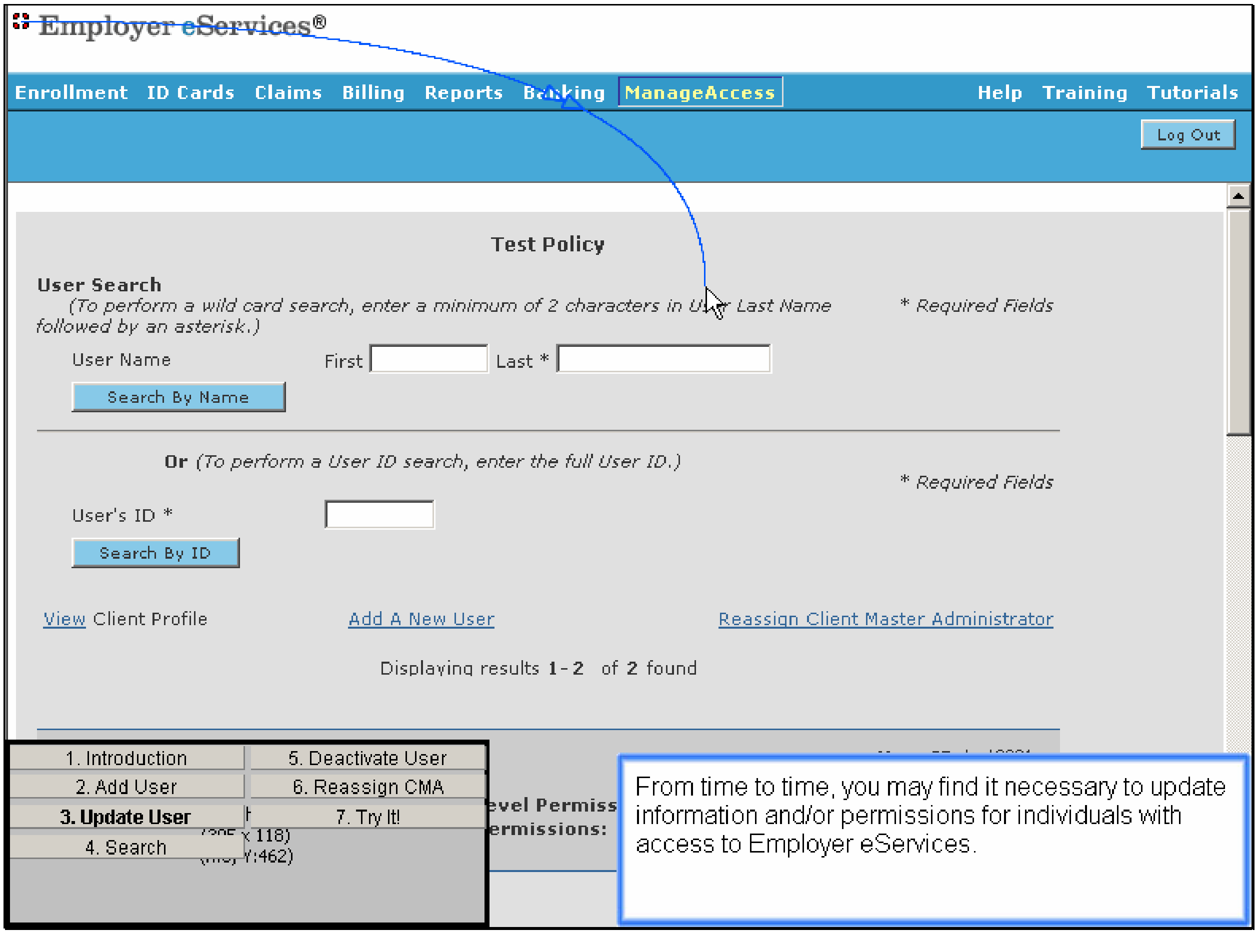
A second review page displays and confirms that the new user has been activated and notified via e-mail.

034



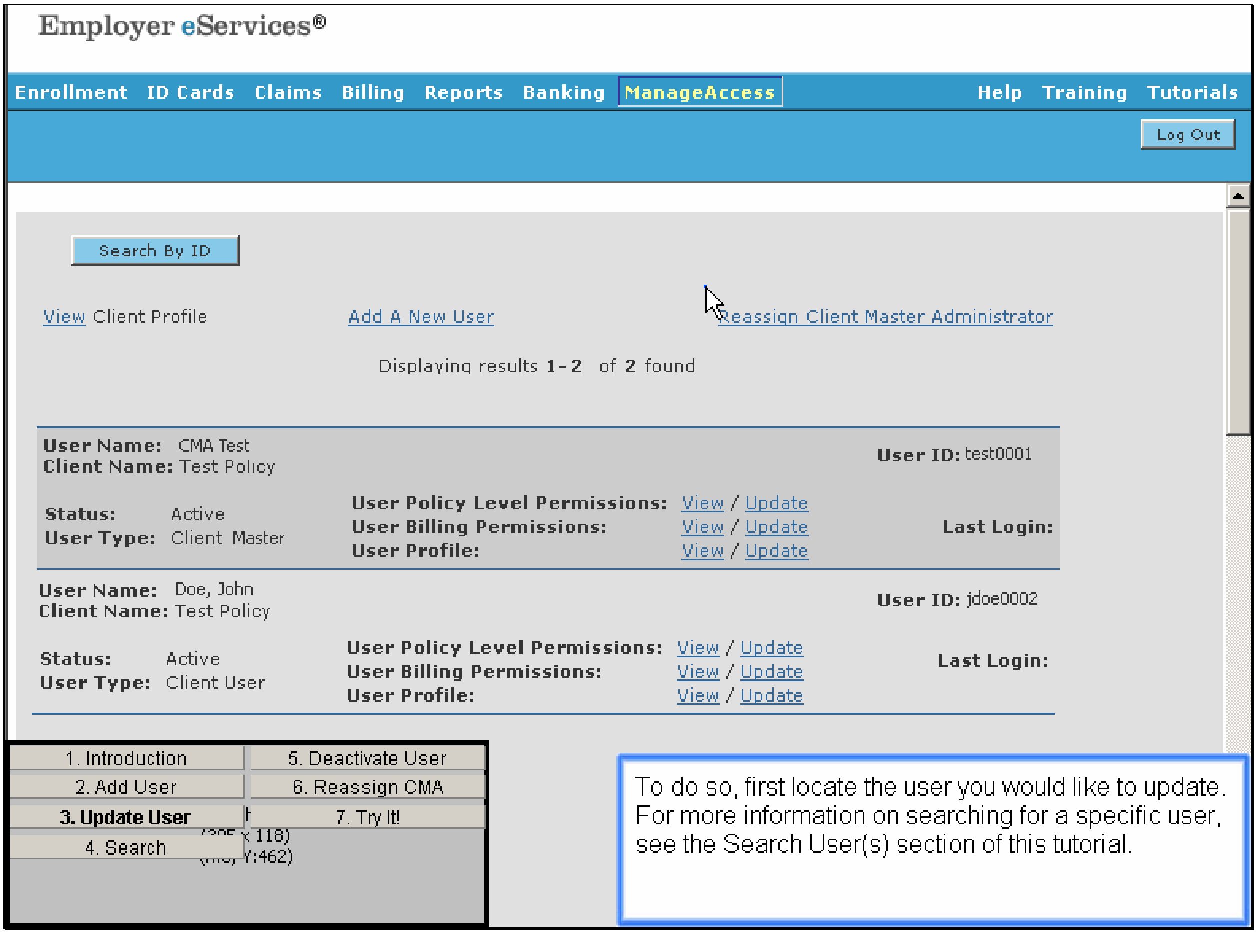
The new user is now included on the User Search page.

035



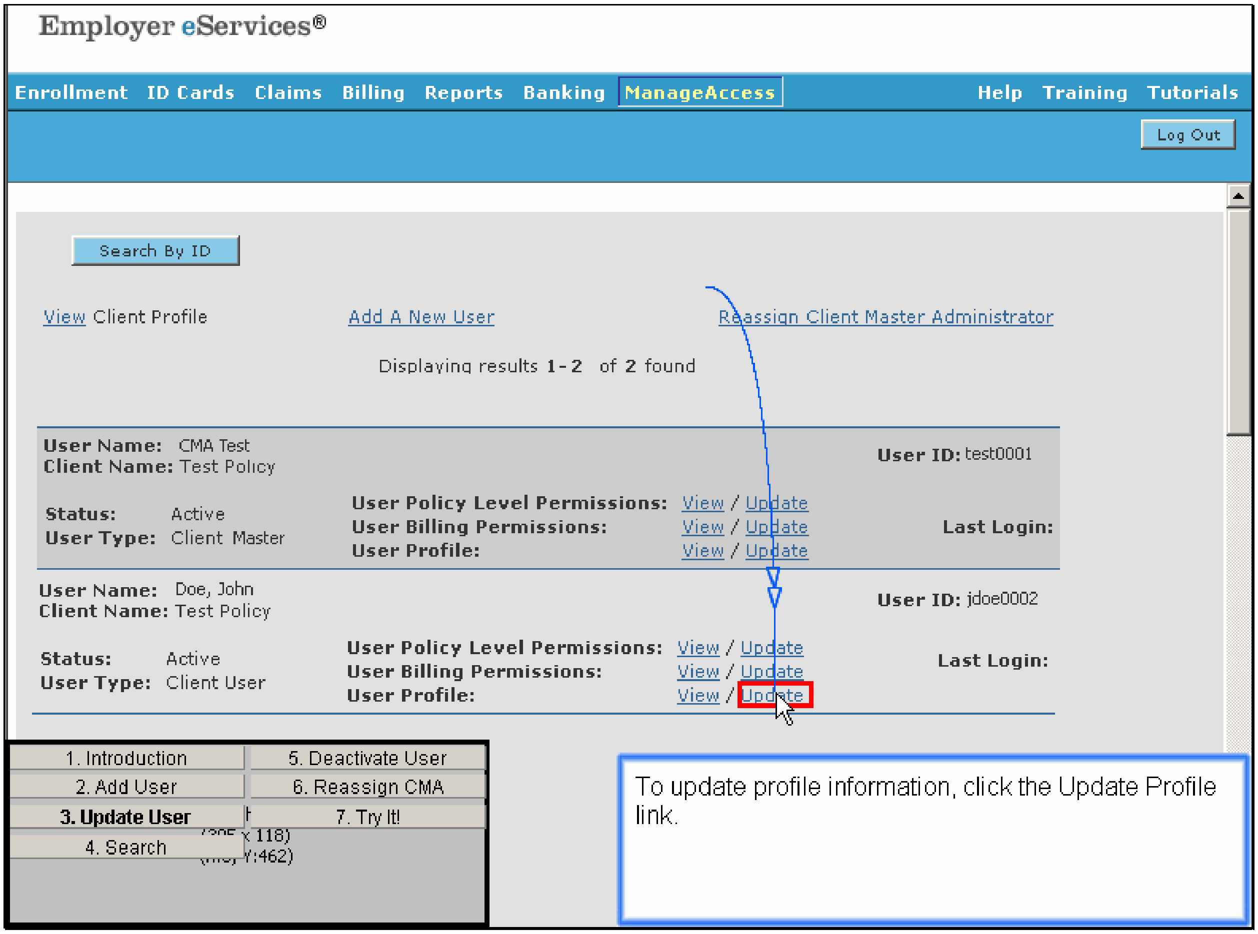
From time to time, you may find it necessary to update information and/or permissions for individuals with access to Employer eServices.

036



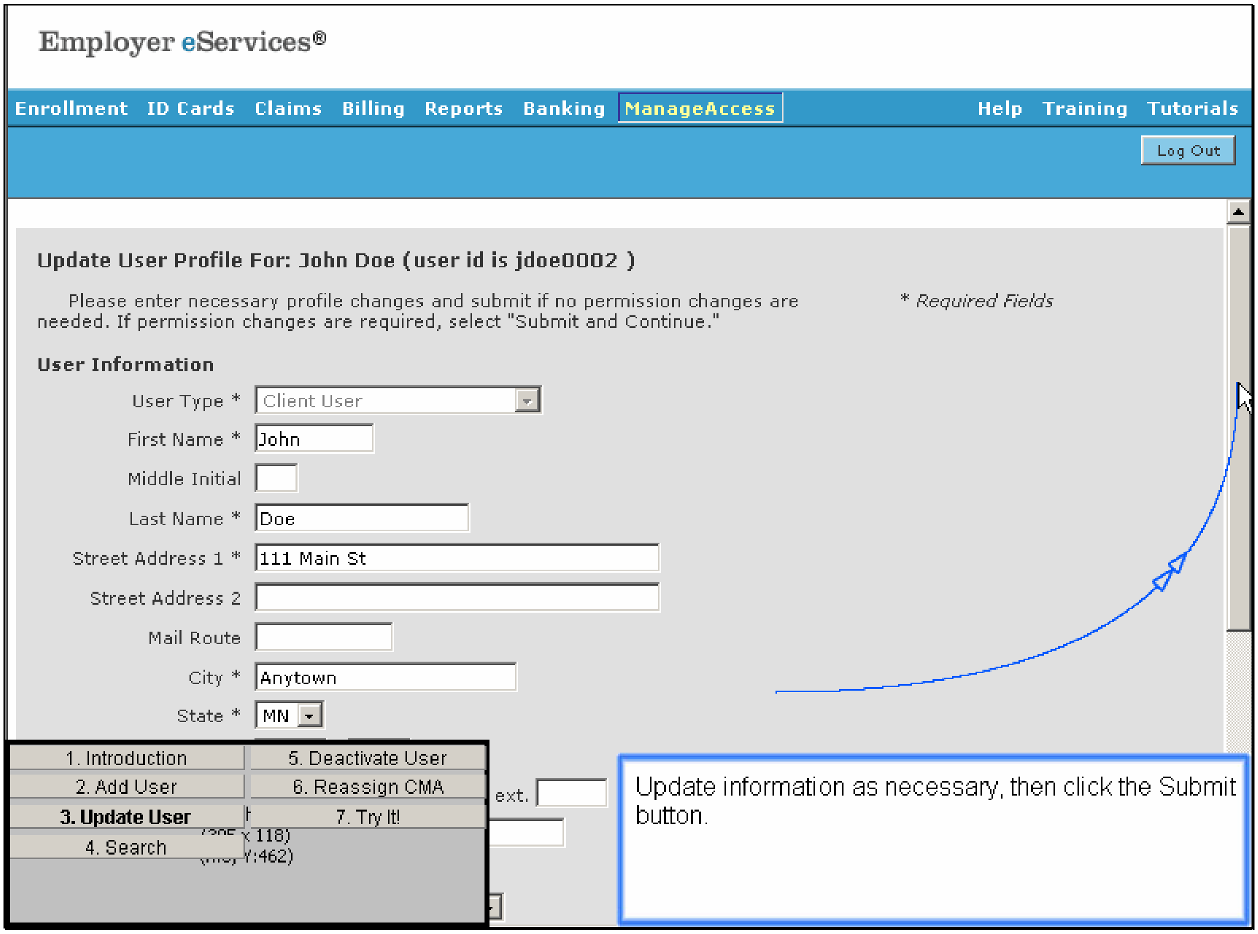
To do so, first locate the user you would like to update. For more information on searching for a specific user, see the Search User(s) section of this tutorial.

037



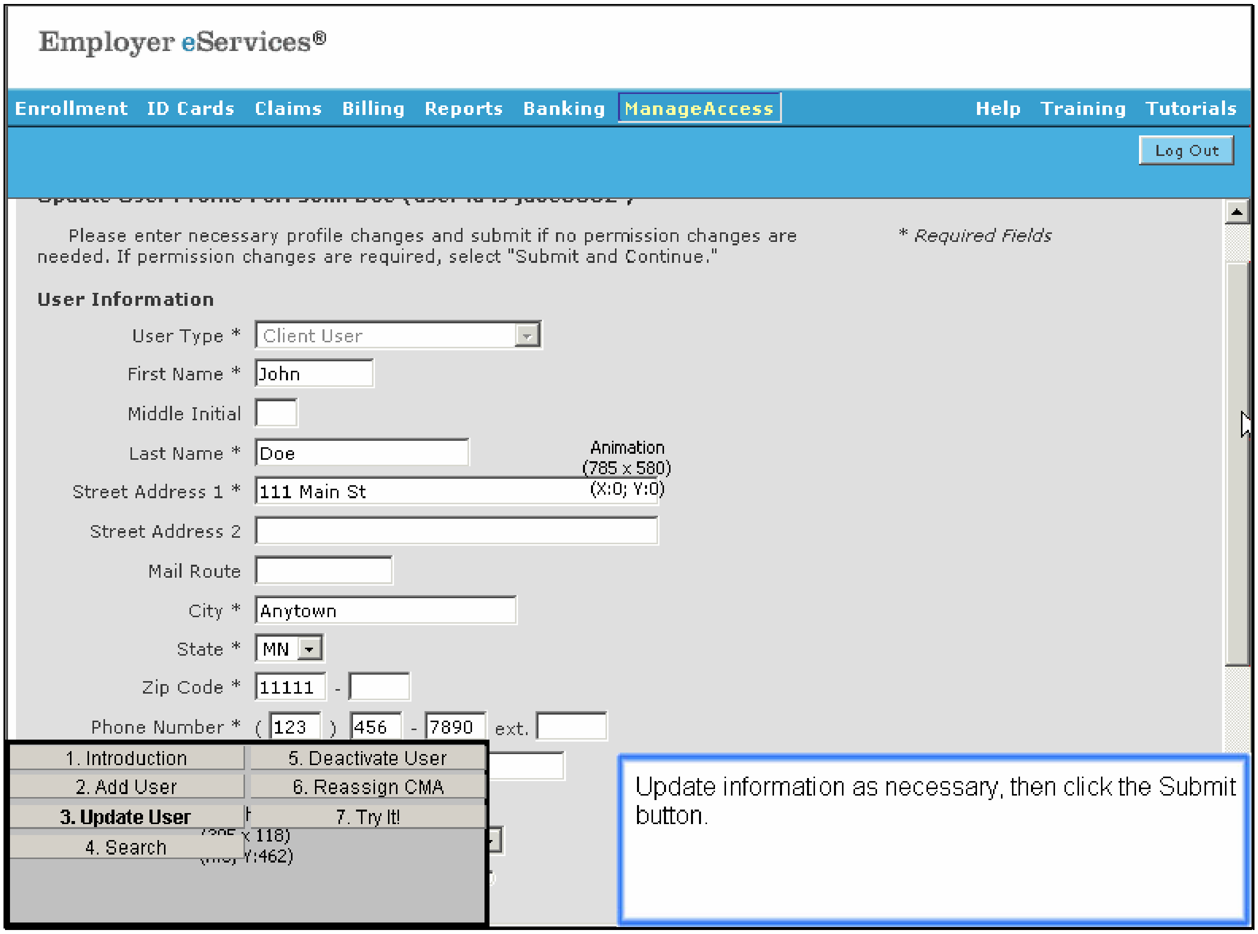
To update profile information, click the Update Profile link.

038



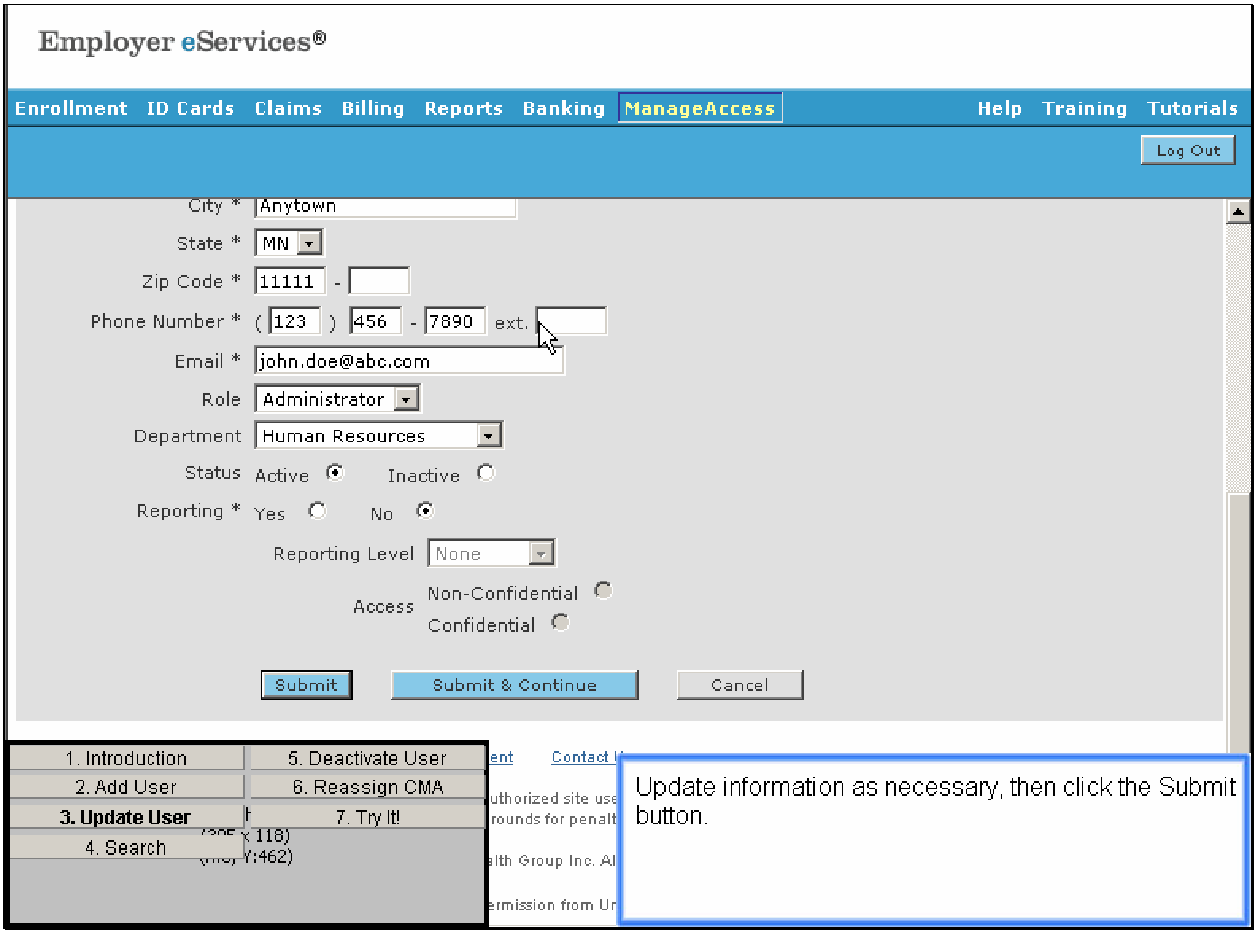
Update information as necessary, then click the Submit button.

039



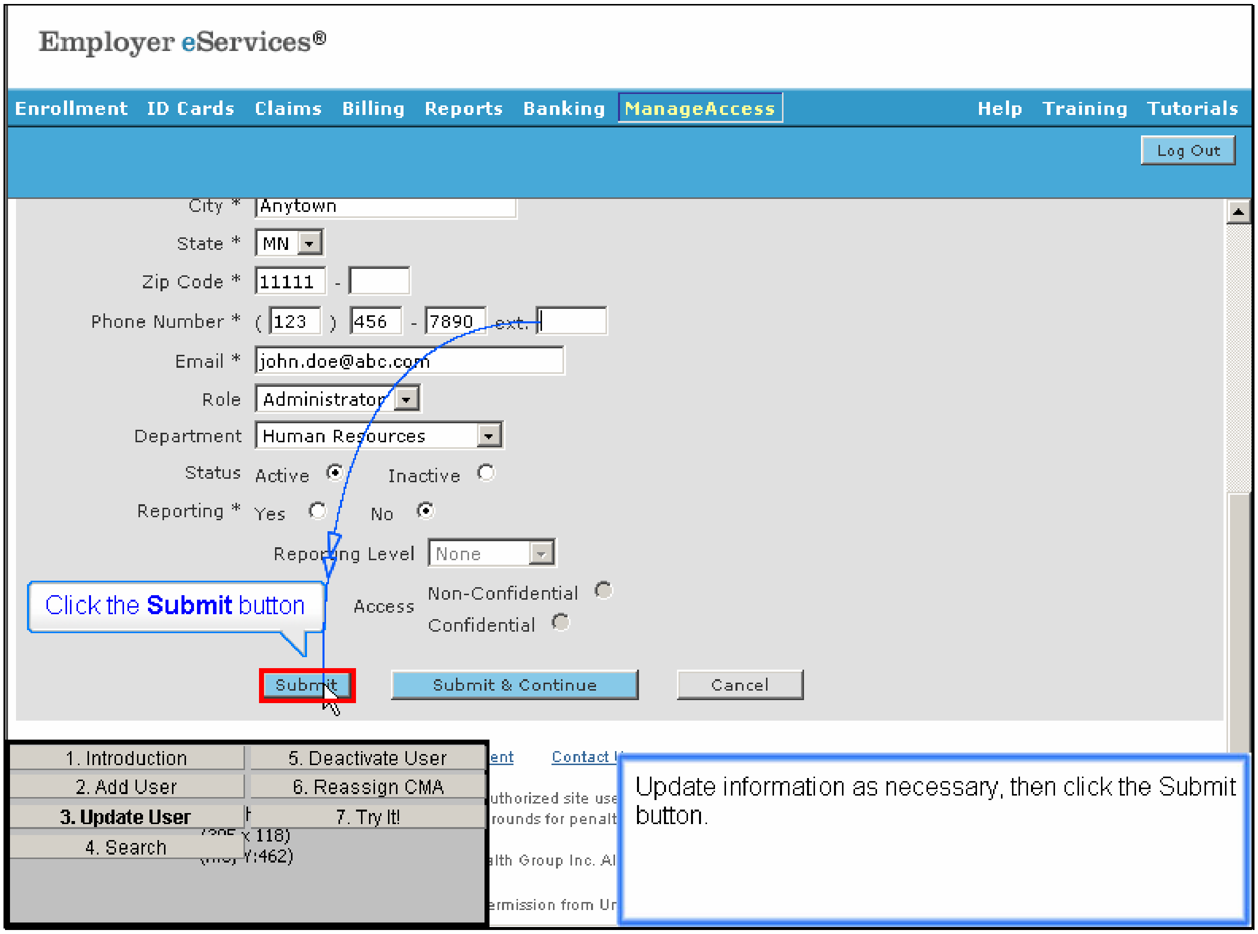
Update information as necessary, then click the Submit button.

040



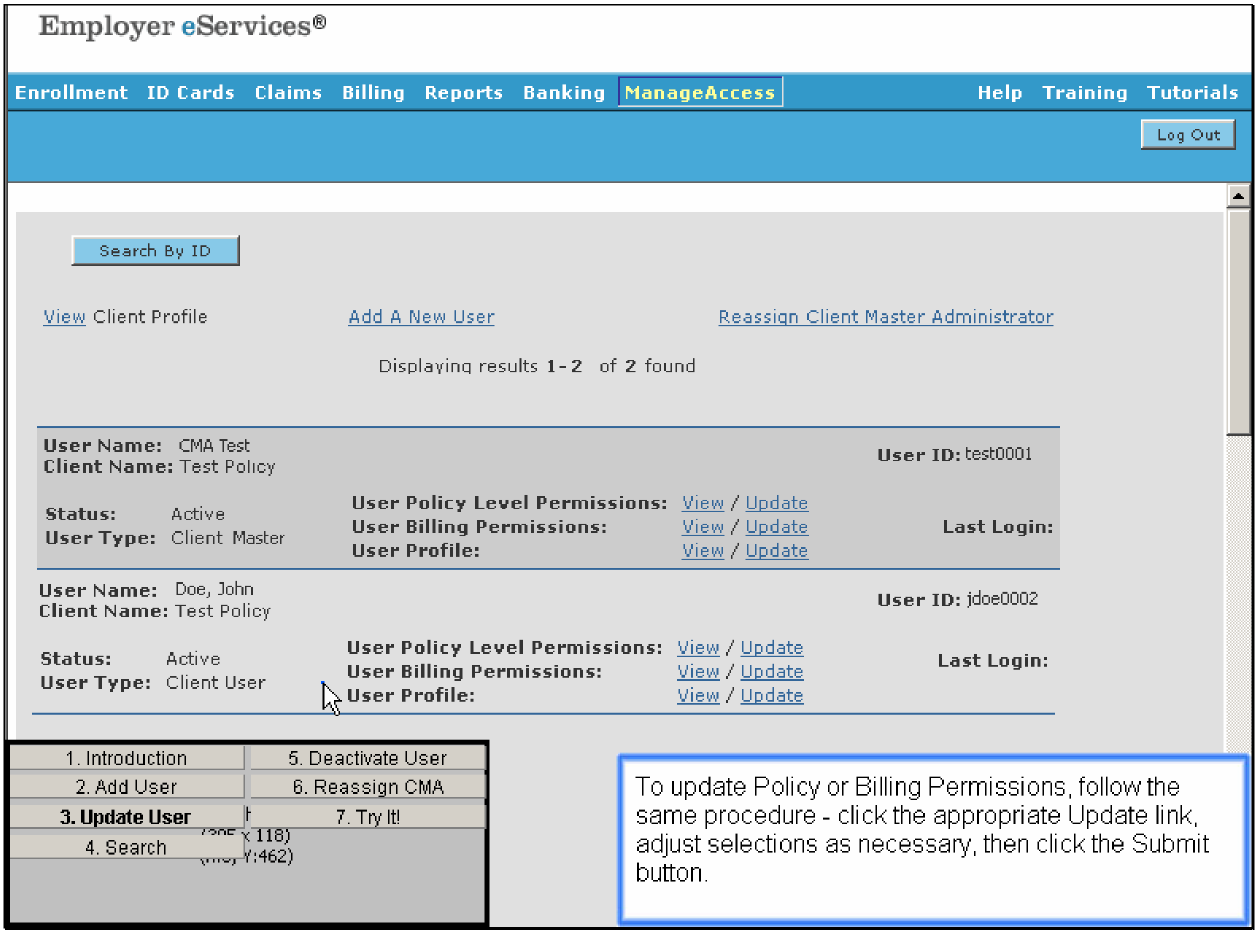
Update information as necessary, then click the Submit button.

041



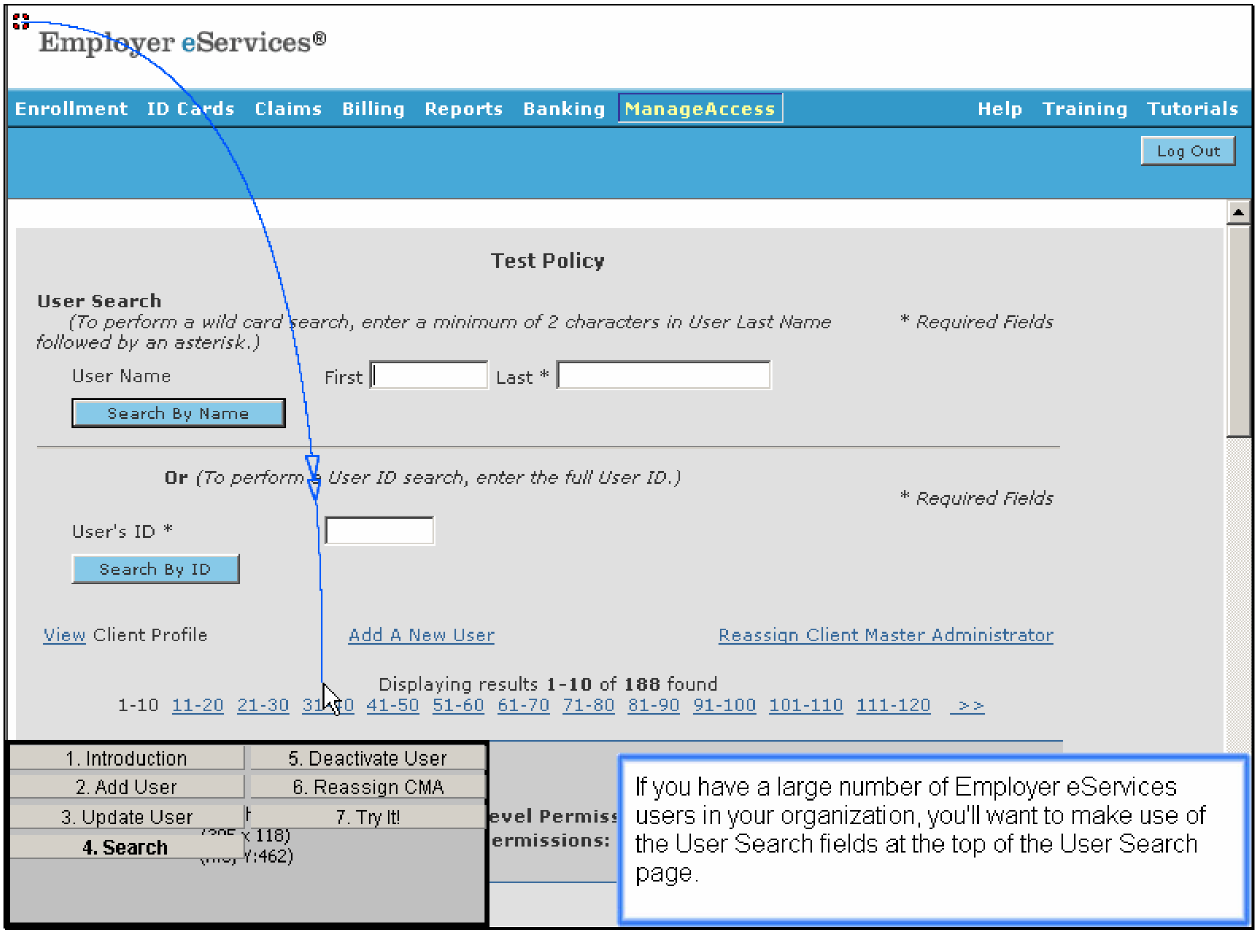
Update information as necessary, then click the Submit button.

042



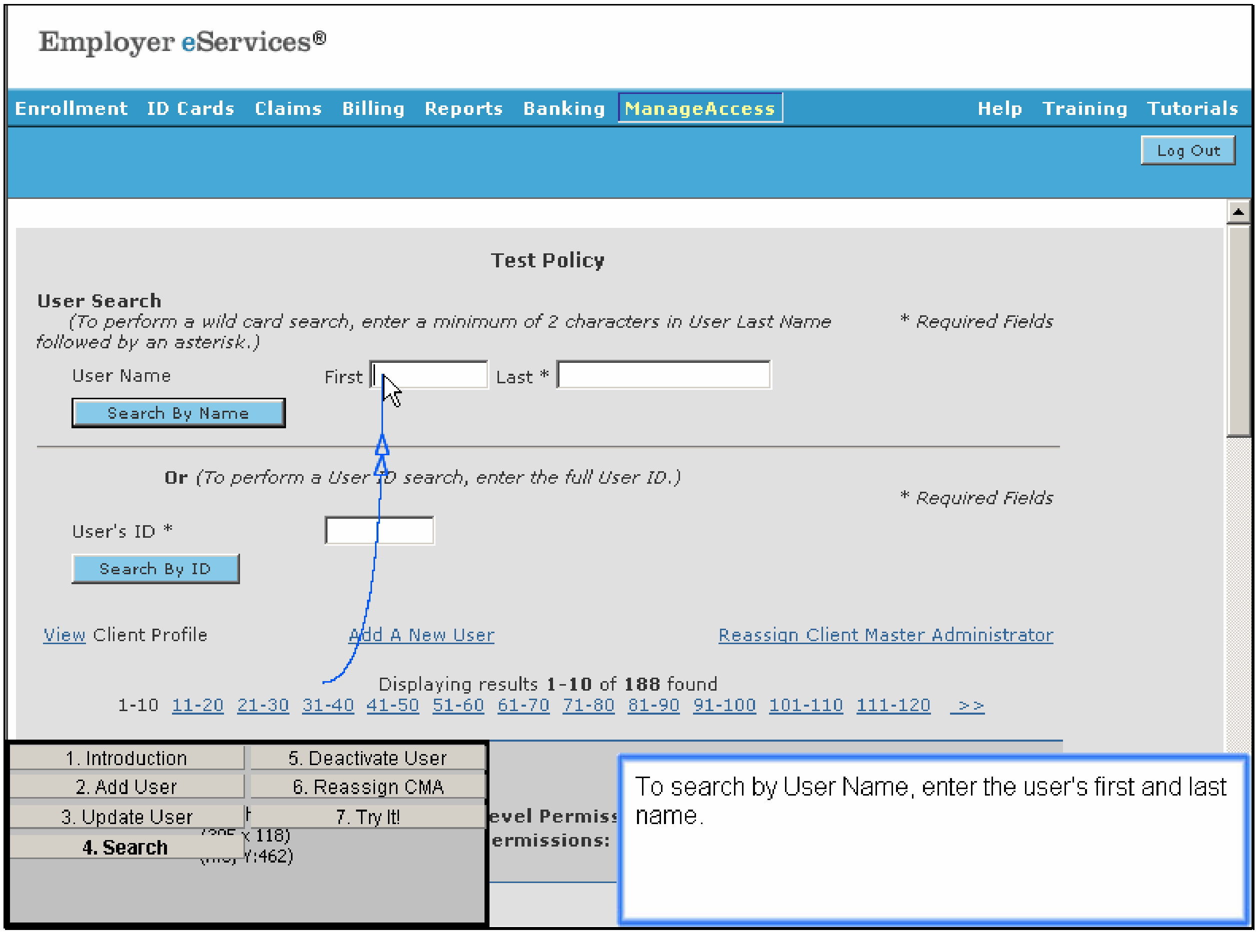
To update Policy or Billing Permissions, follow the same procedure - click the appropriate Update link, adjust selections as necessary, then click the Submit button.

043



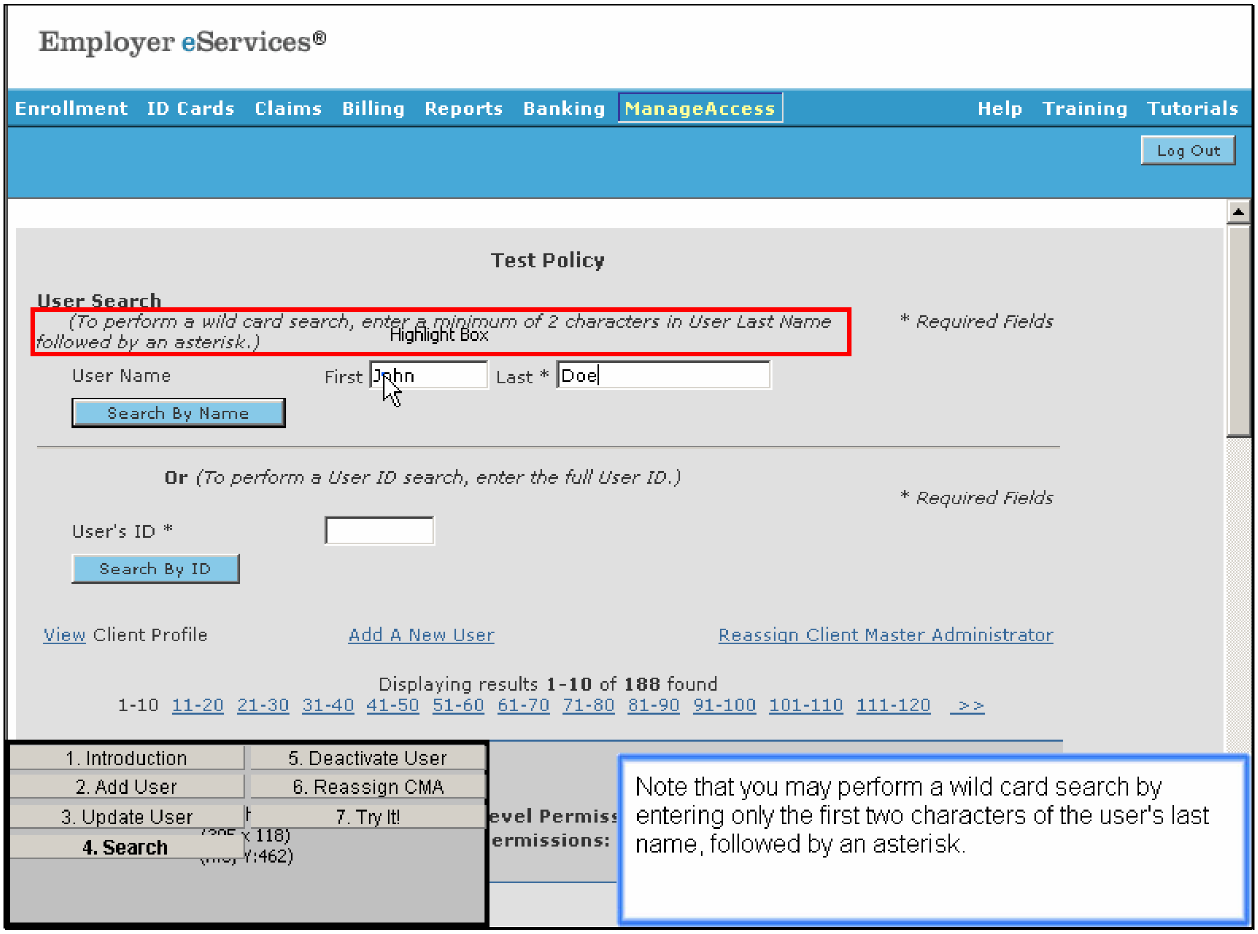
If you have a large number of Employer eServices users in your organization, you'll want to make use of the User Search fields at the top of the User Search page.

044



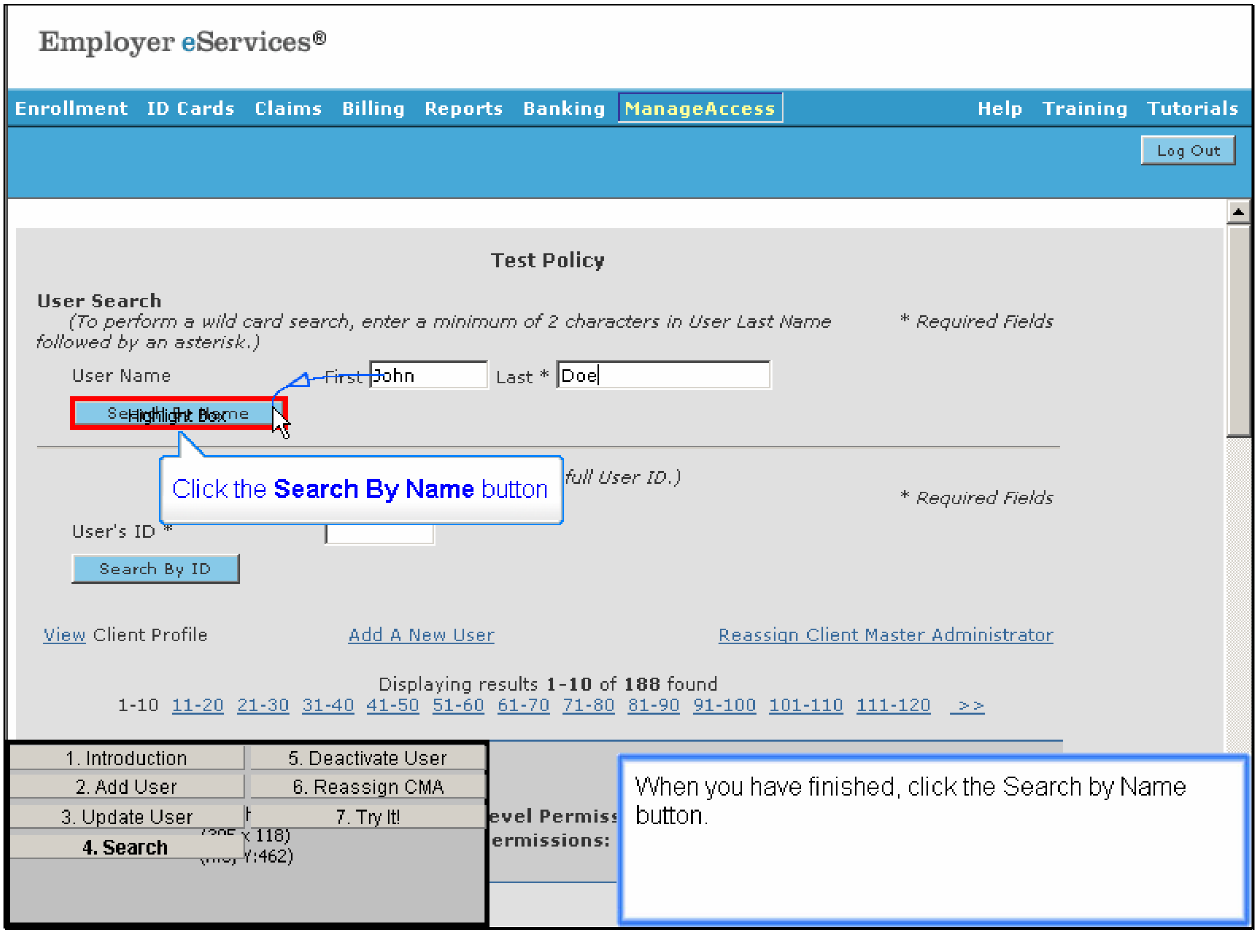
To search by User Name, enter the user's first and last name.

045



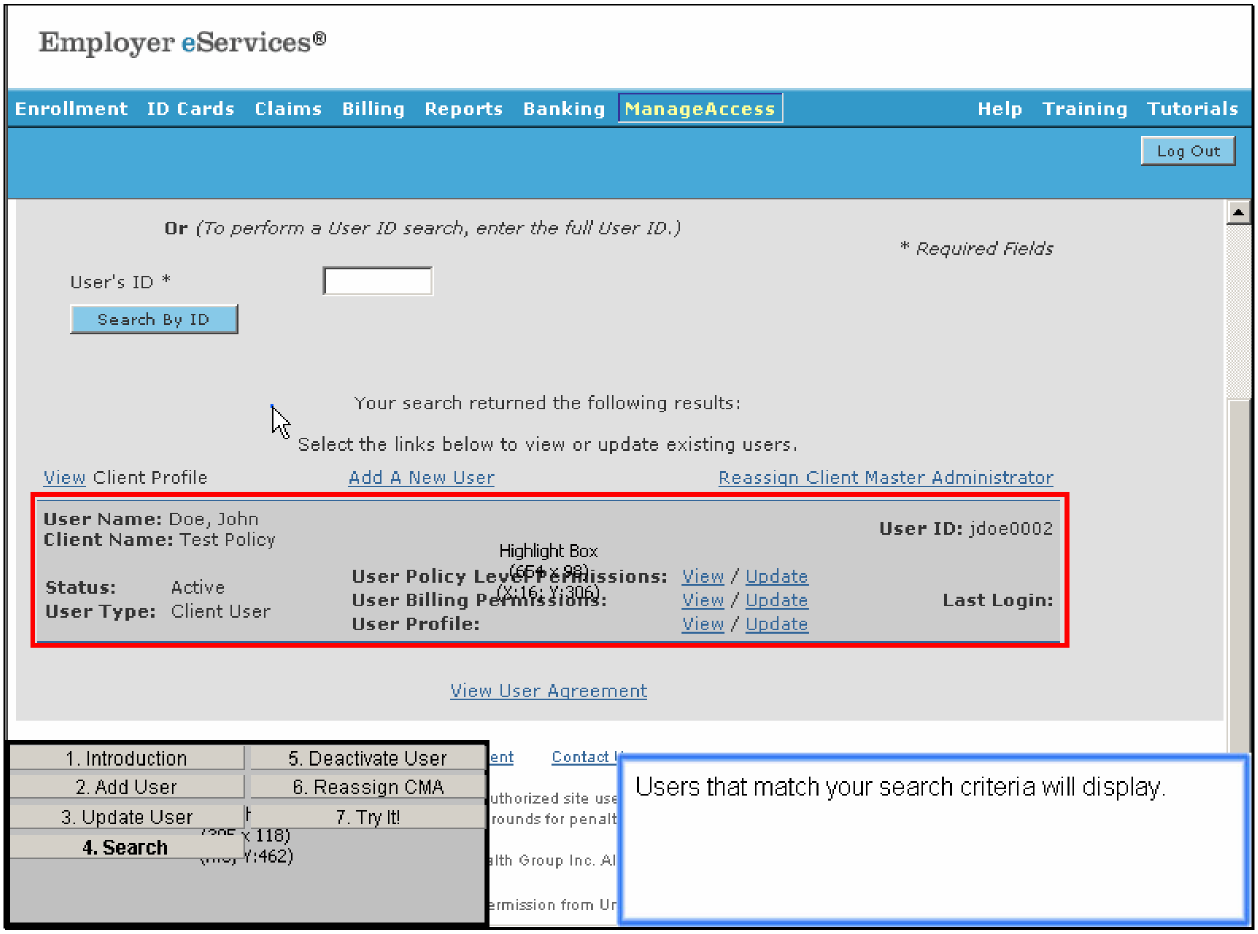
Note that you may perform a wild card search by entering only the first two characters of the user's last name, followed by an asterisk.

046



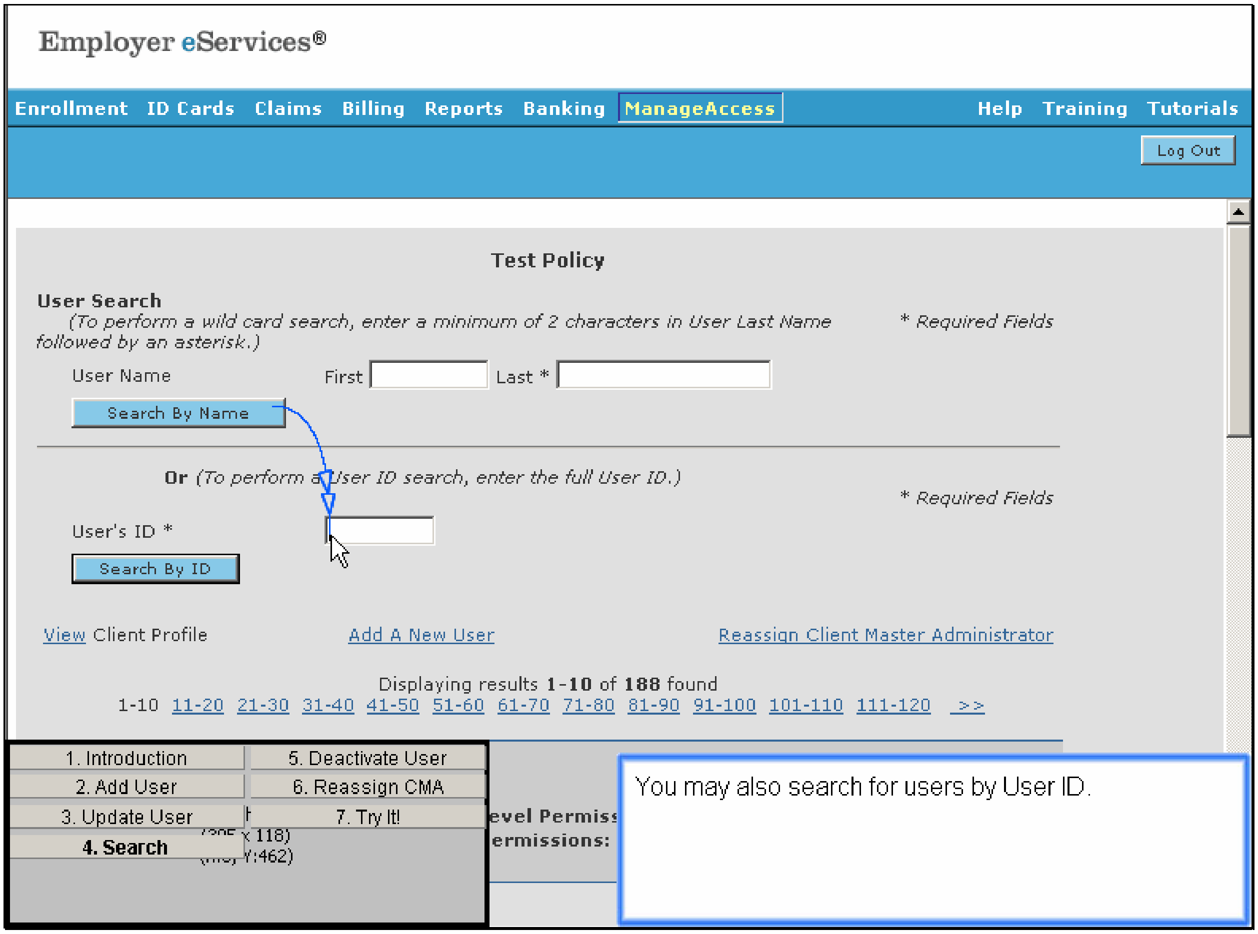
When you have finished, click the Search by Name button.

047



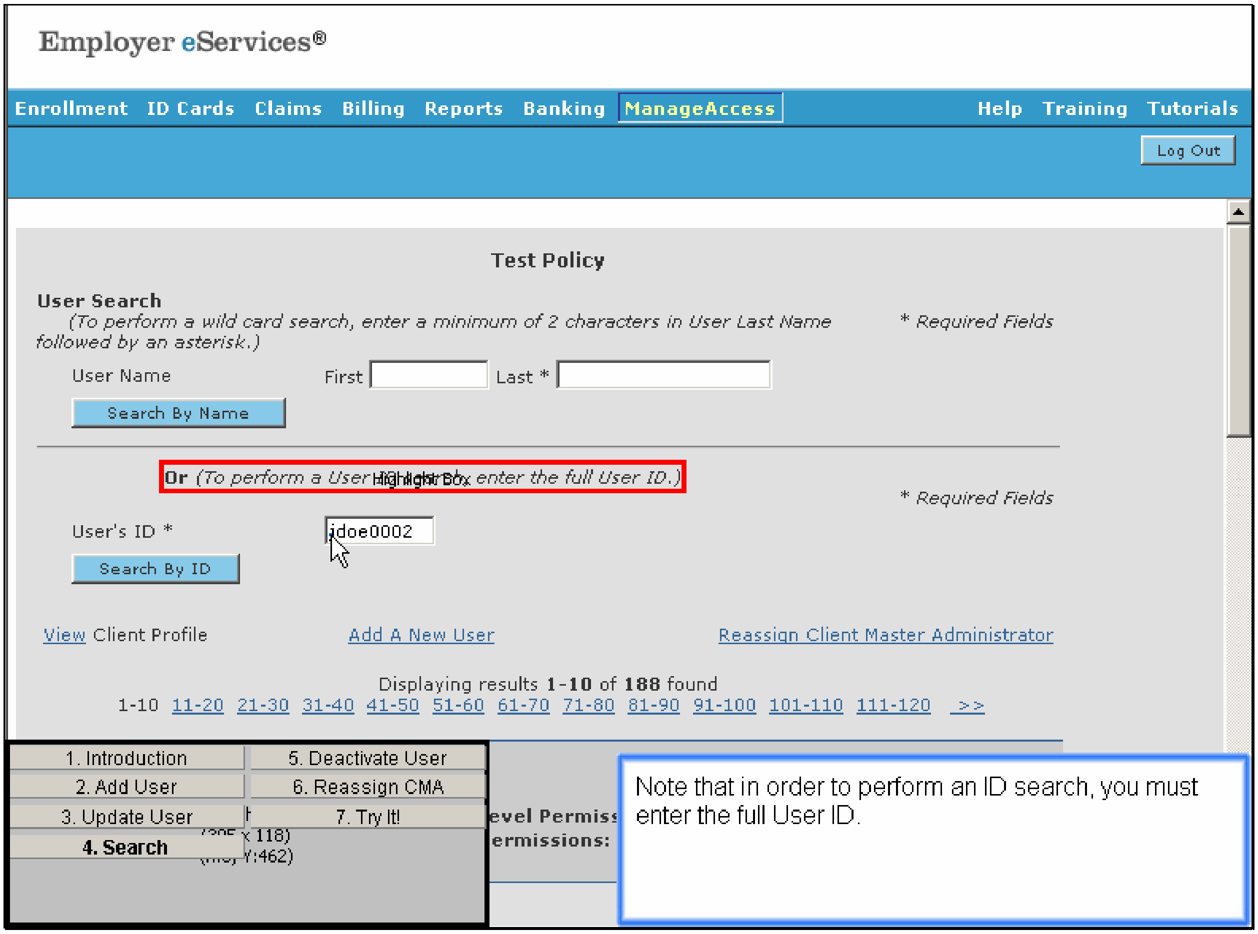
Users that match your search criteria will display.

048



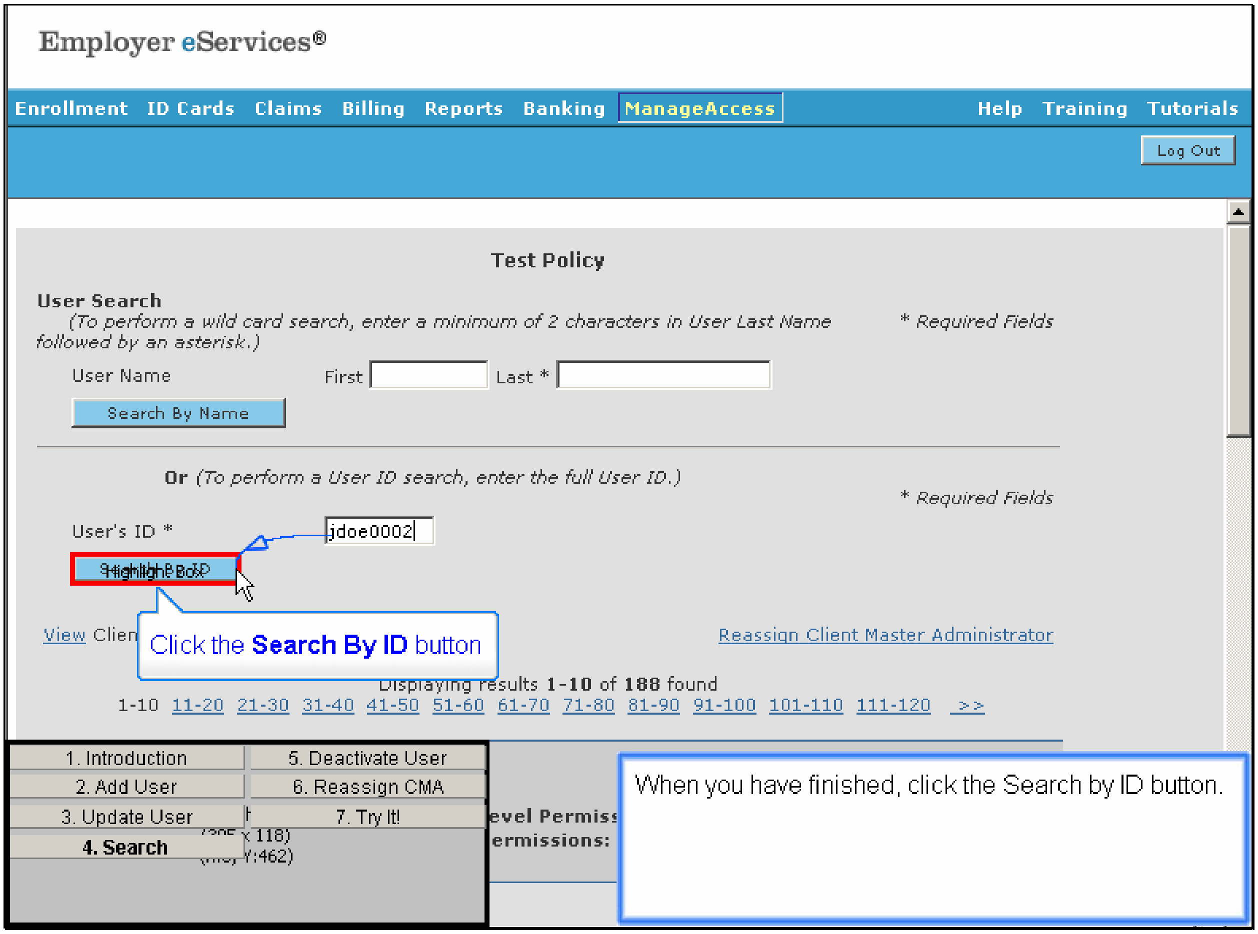
You may also search for users by User ID.

049



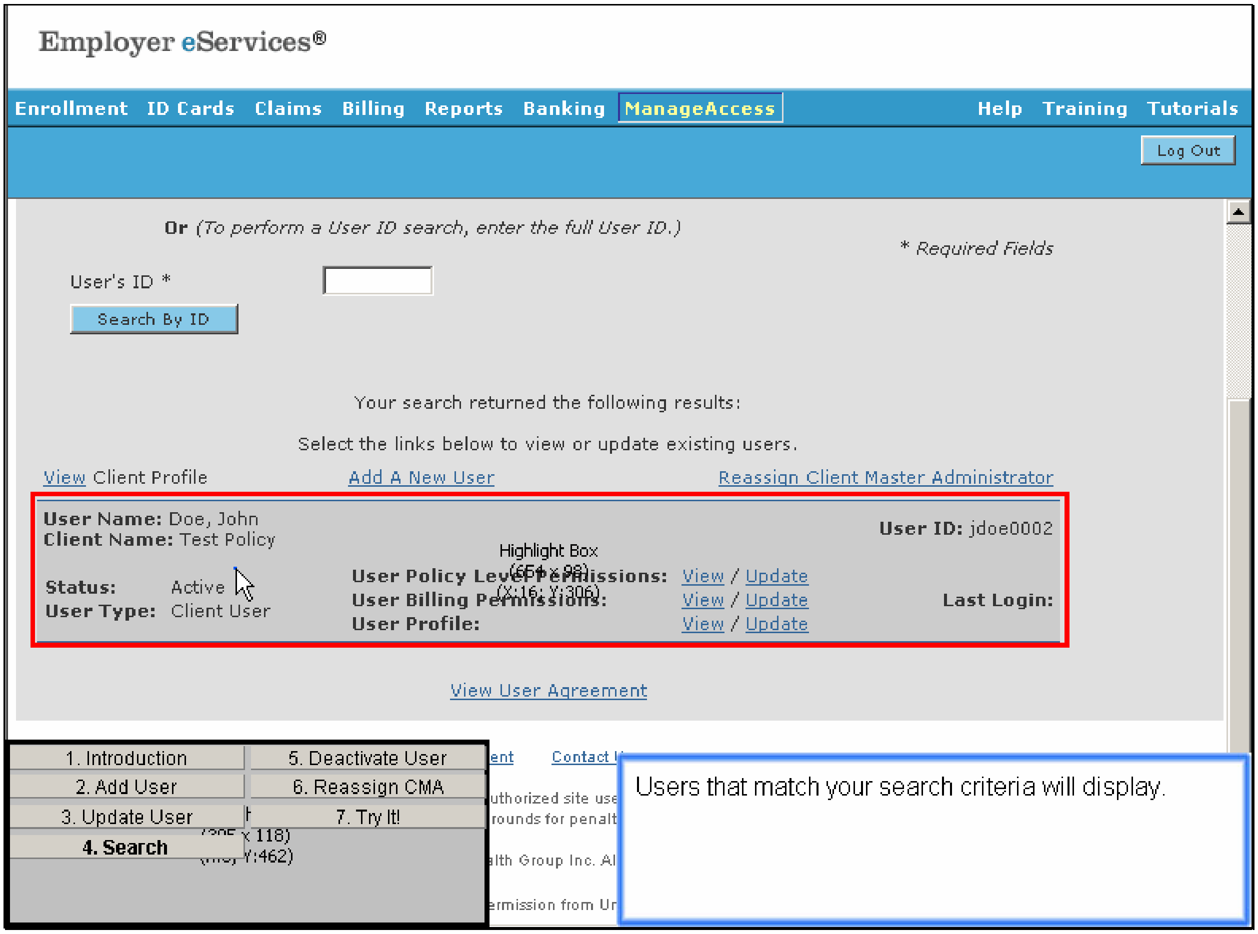
Note that in order to perform an ID search, you must enter the full User ID.

050



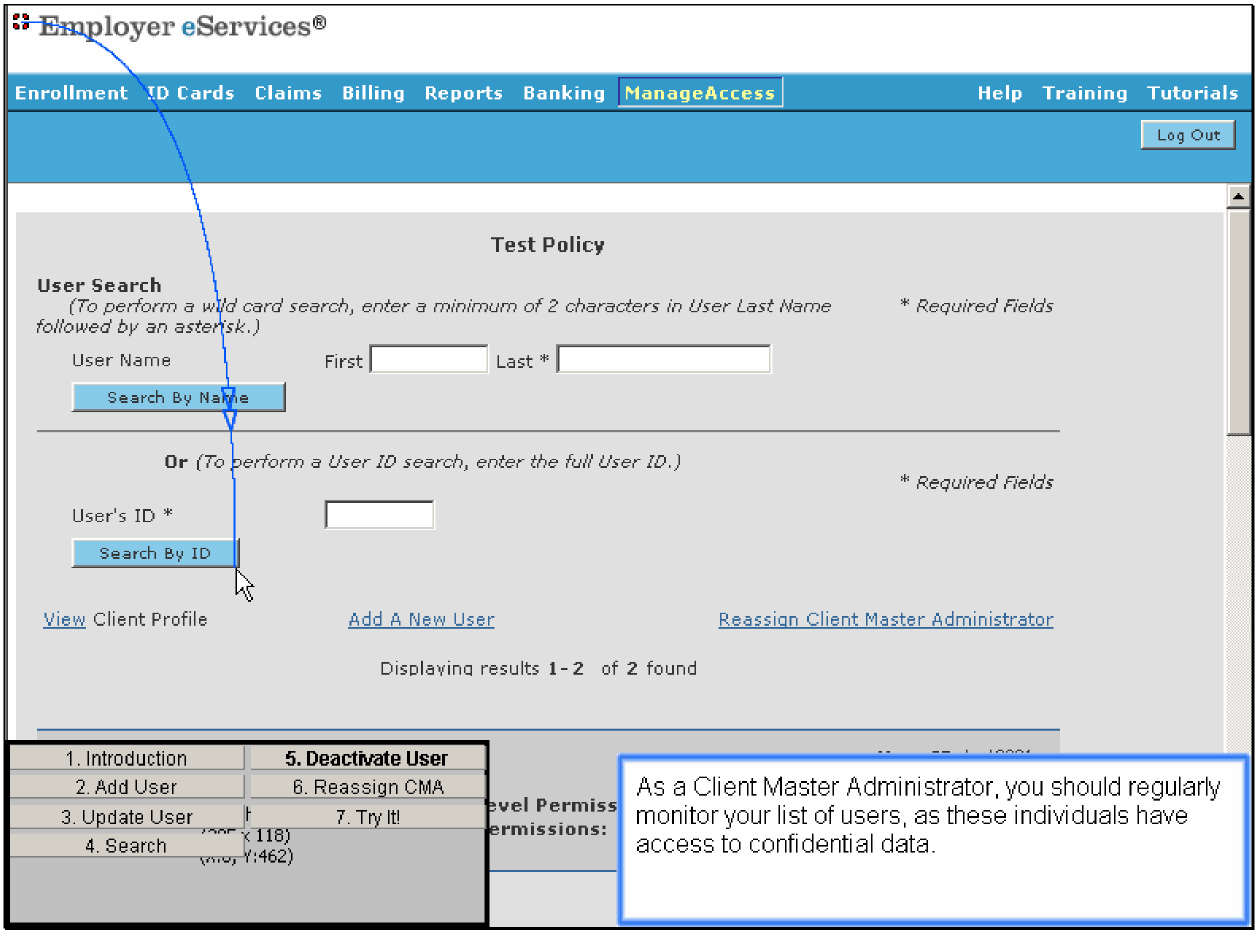
When you have finished, click the Search by ID button.

051



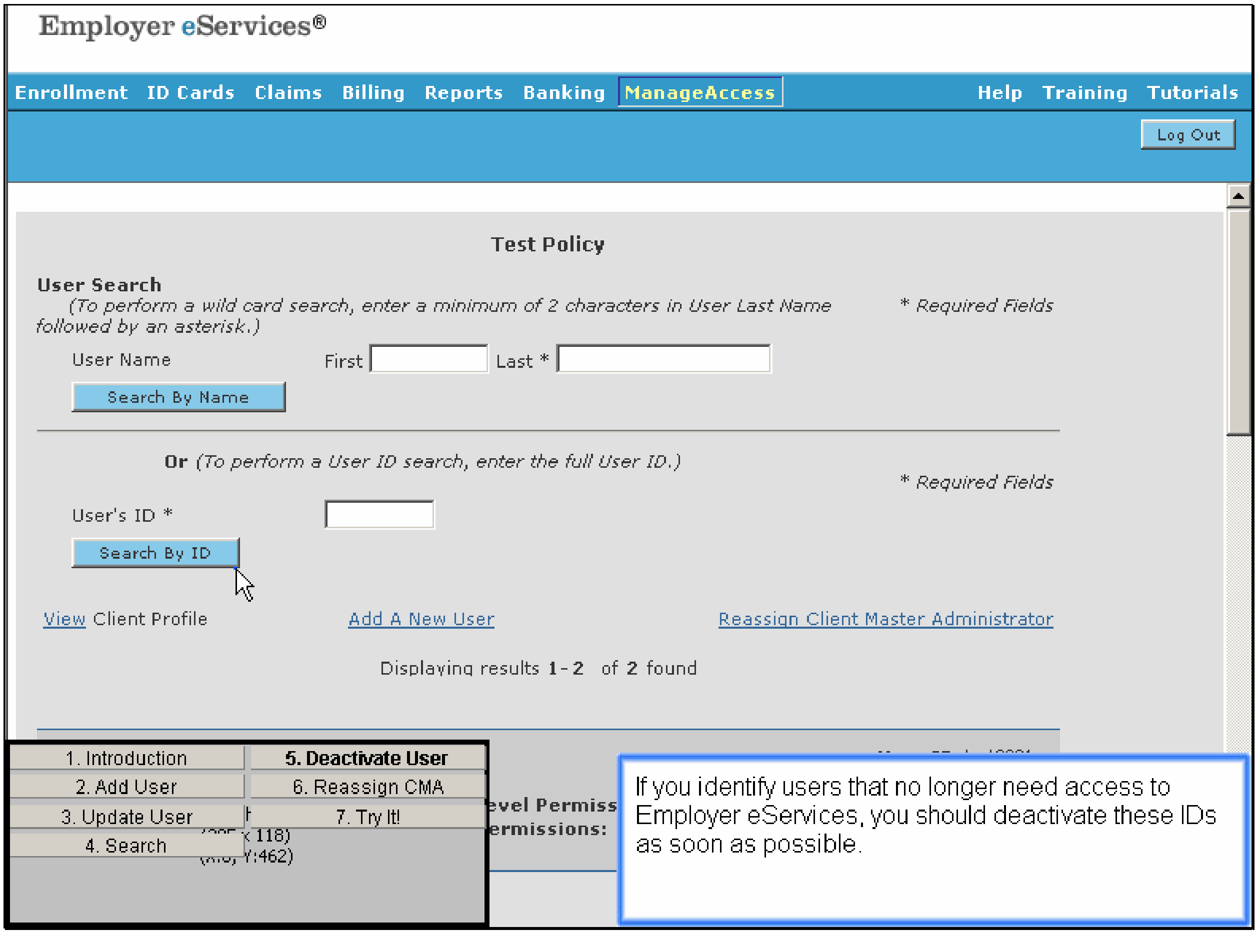
Users that match your search criteria will display.

052



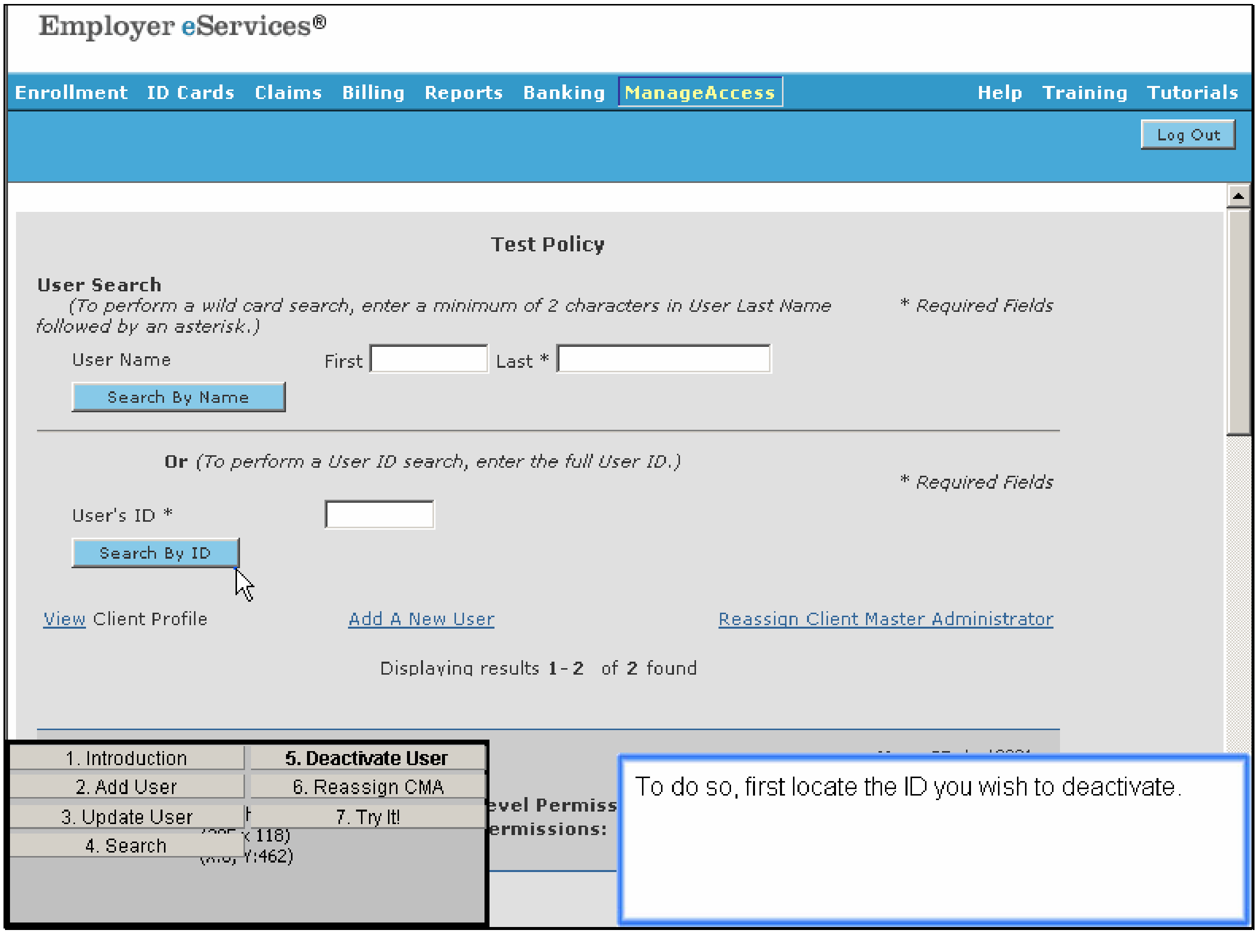
As a Client Master Administrator, you should regularly monitor your list of users, as these individuals have access to confidential data.

053



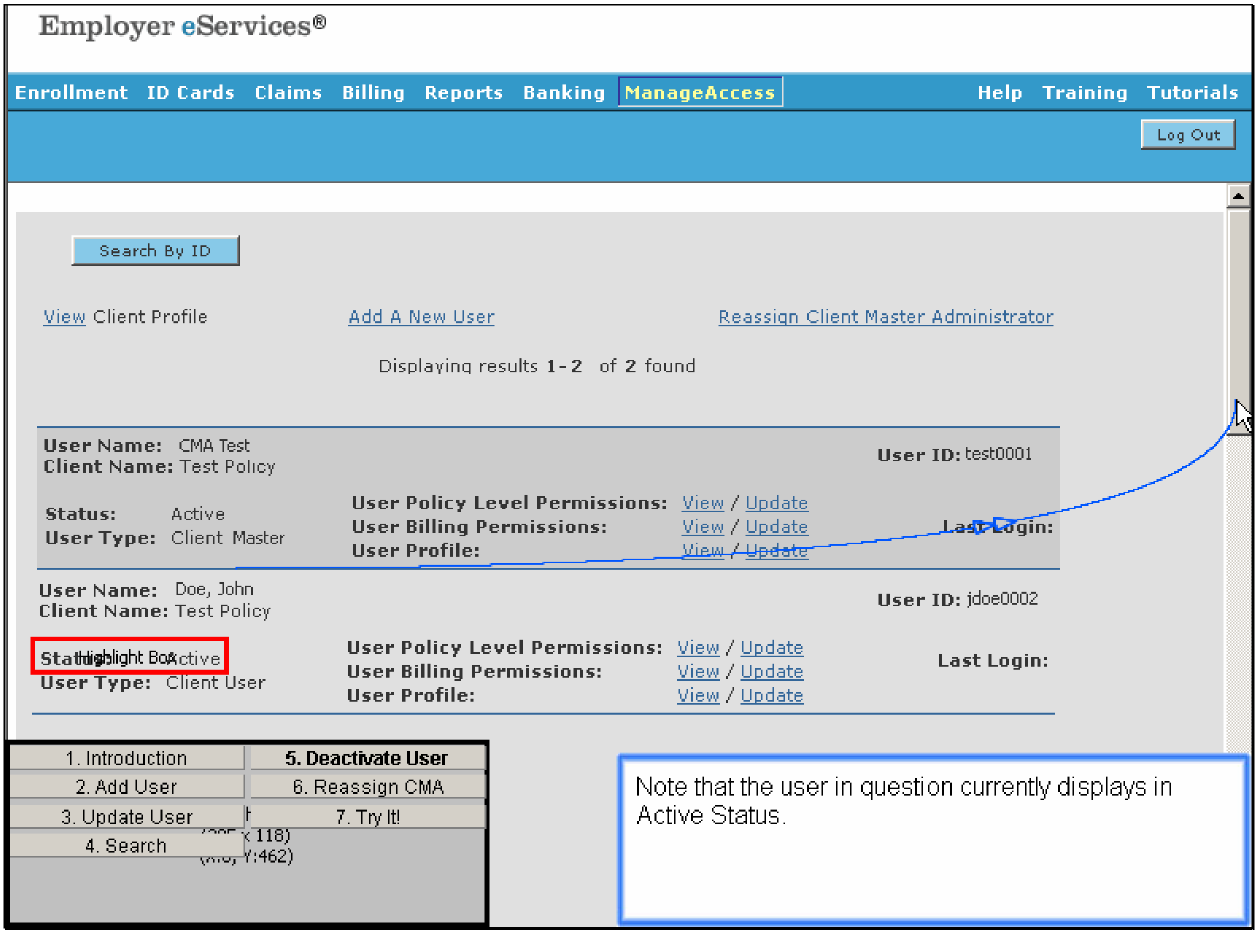
If you identify users that no longer need access to Employer eServices, you should deactivate these IDs as soon as possible.

054



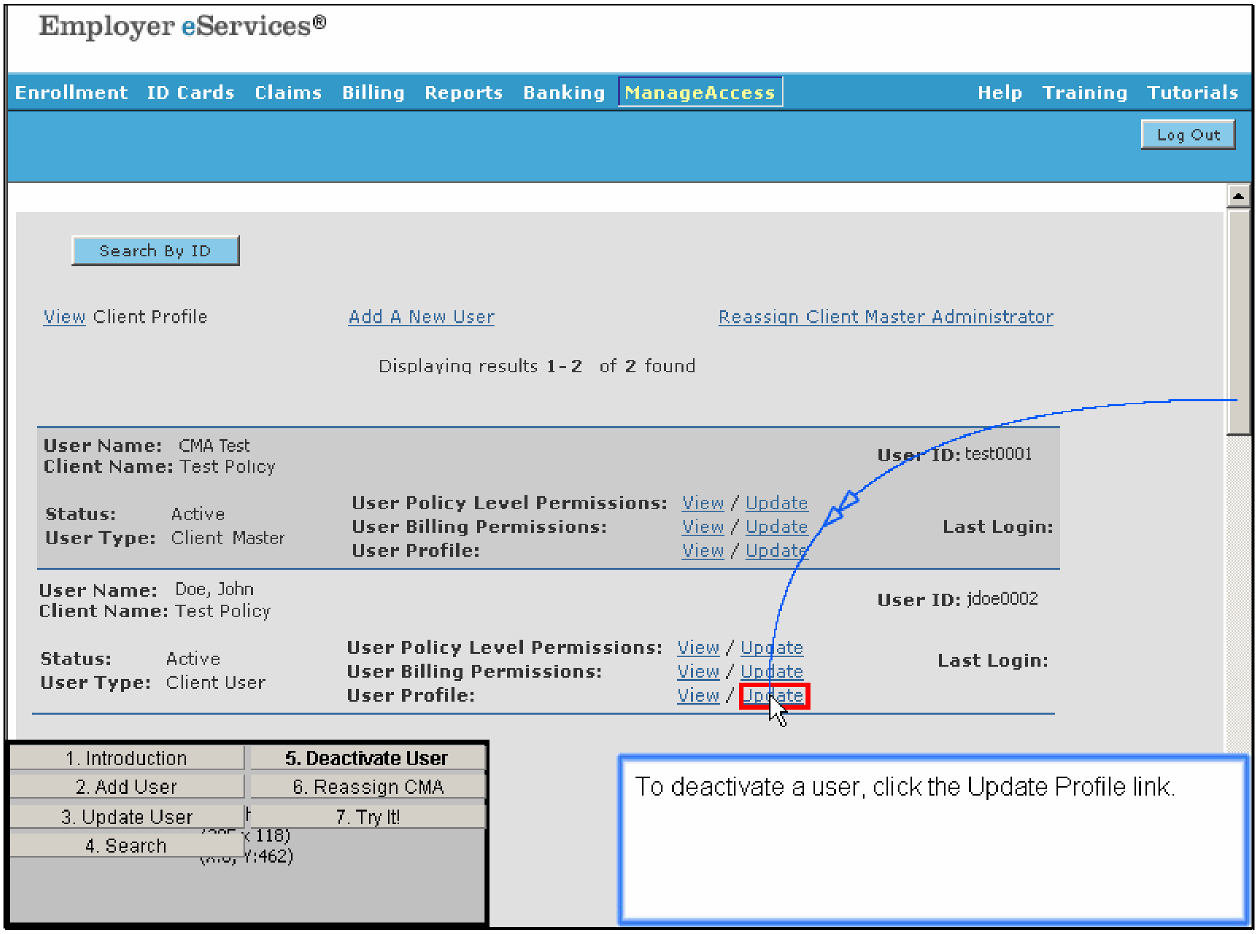
To do so, first locate the ID you wish to deactivate.

055



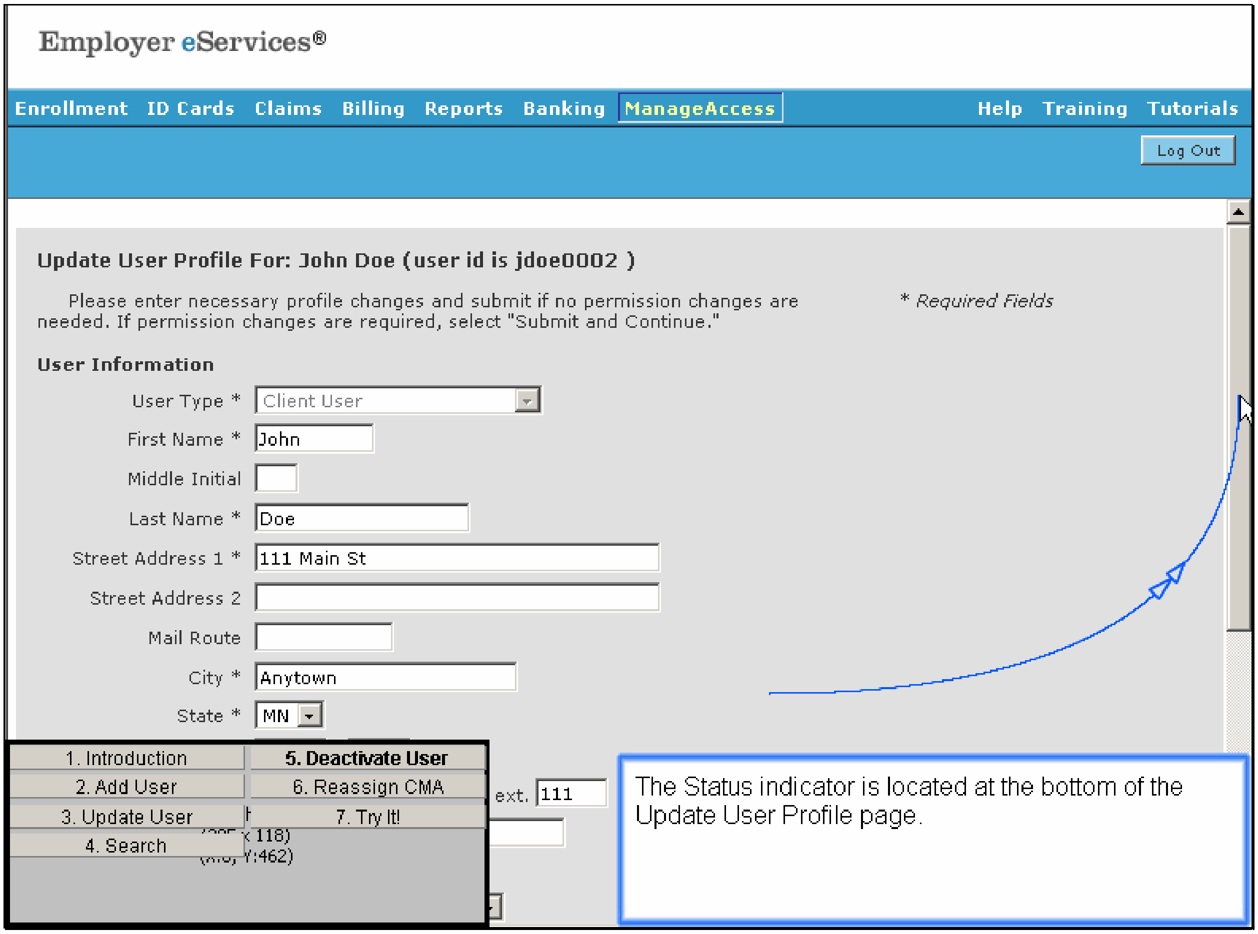
Note that the user in question currently displays in Active Status.

056



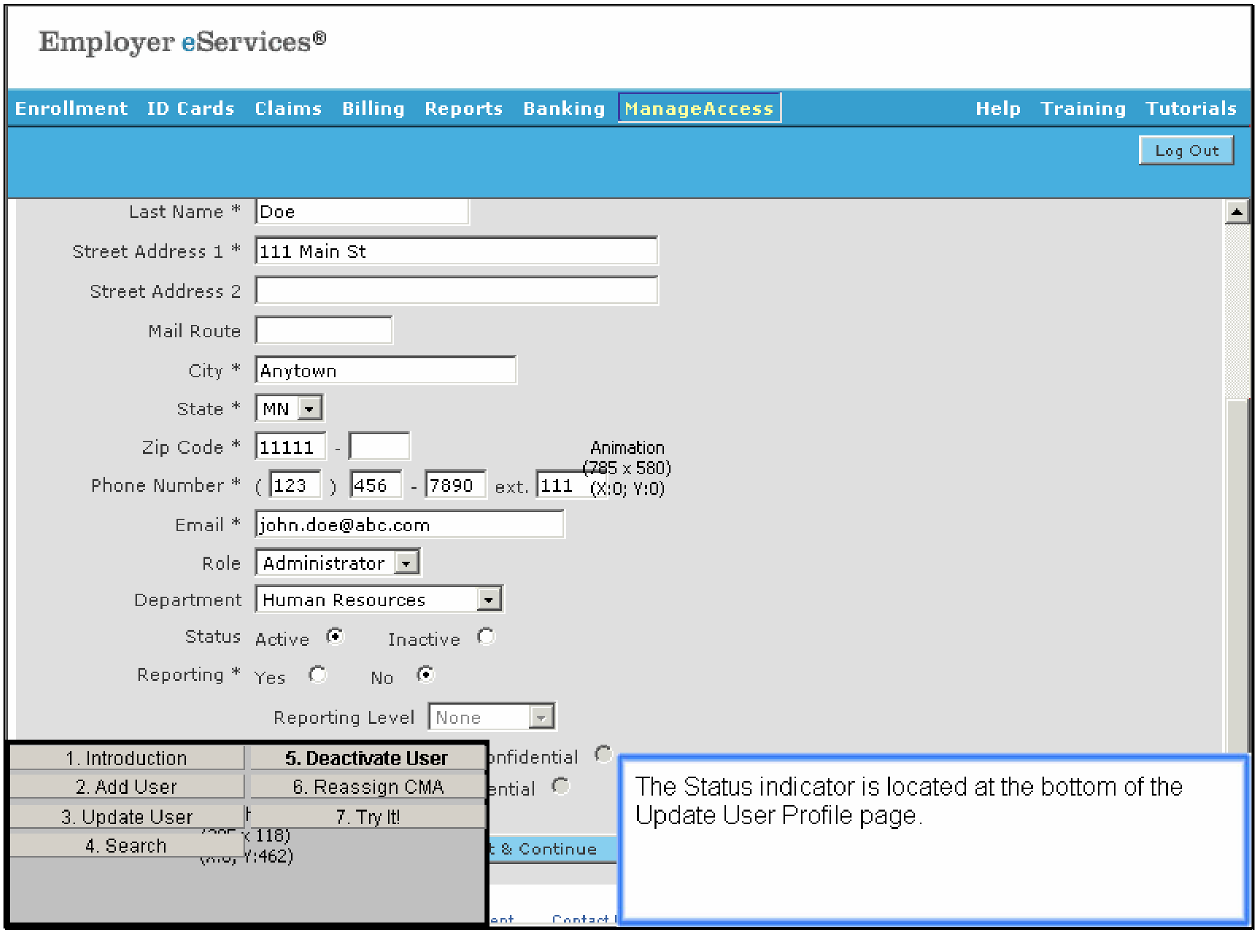
To deactivate a user, click the Update Profile link.

057



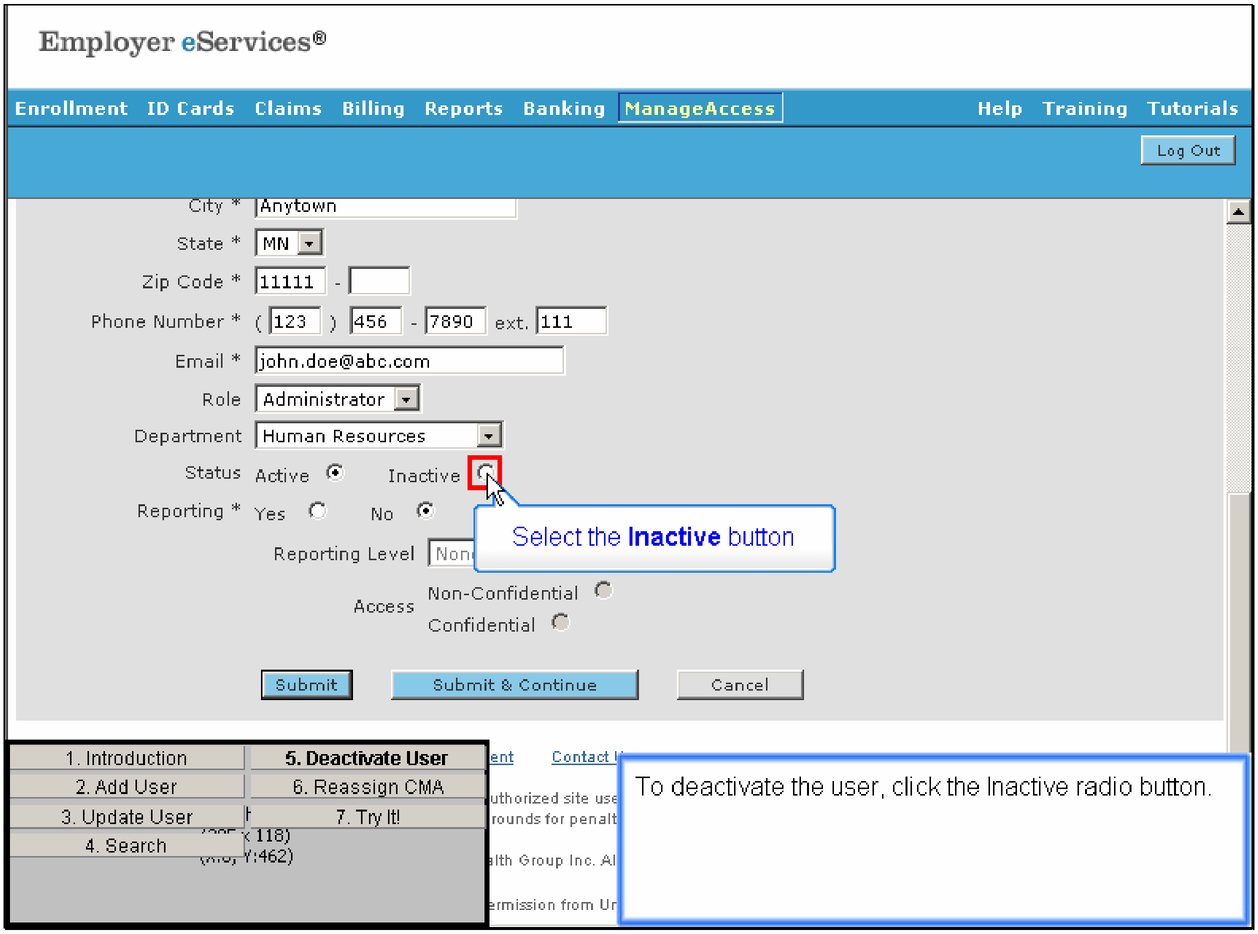
The Status indicator is located at the bottom of the Update User Profile page.

058



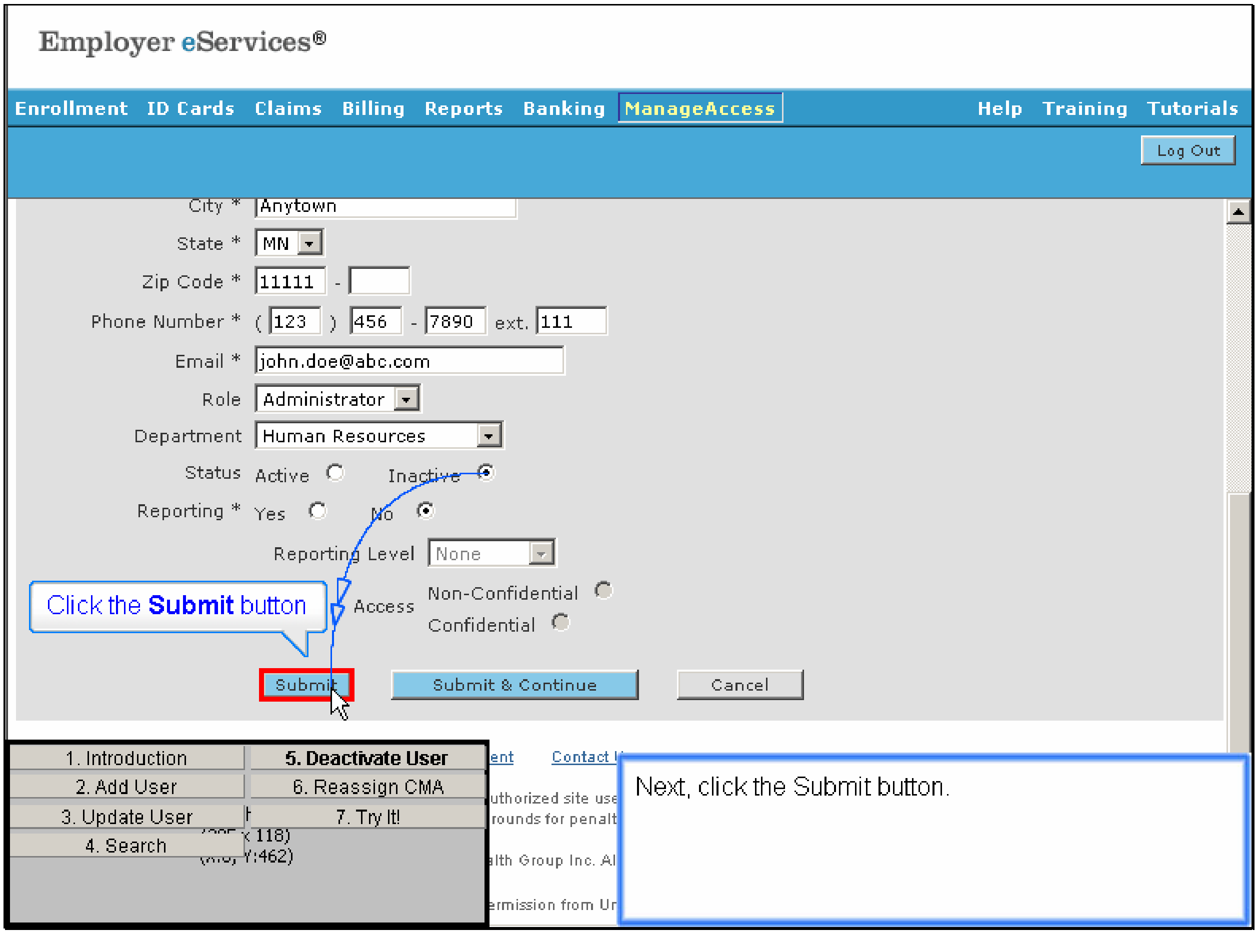
The Status indicator is located at the bottom of the Update User Profile page.

059



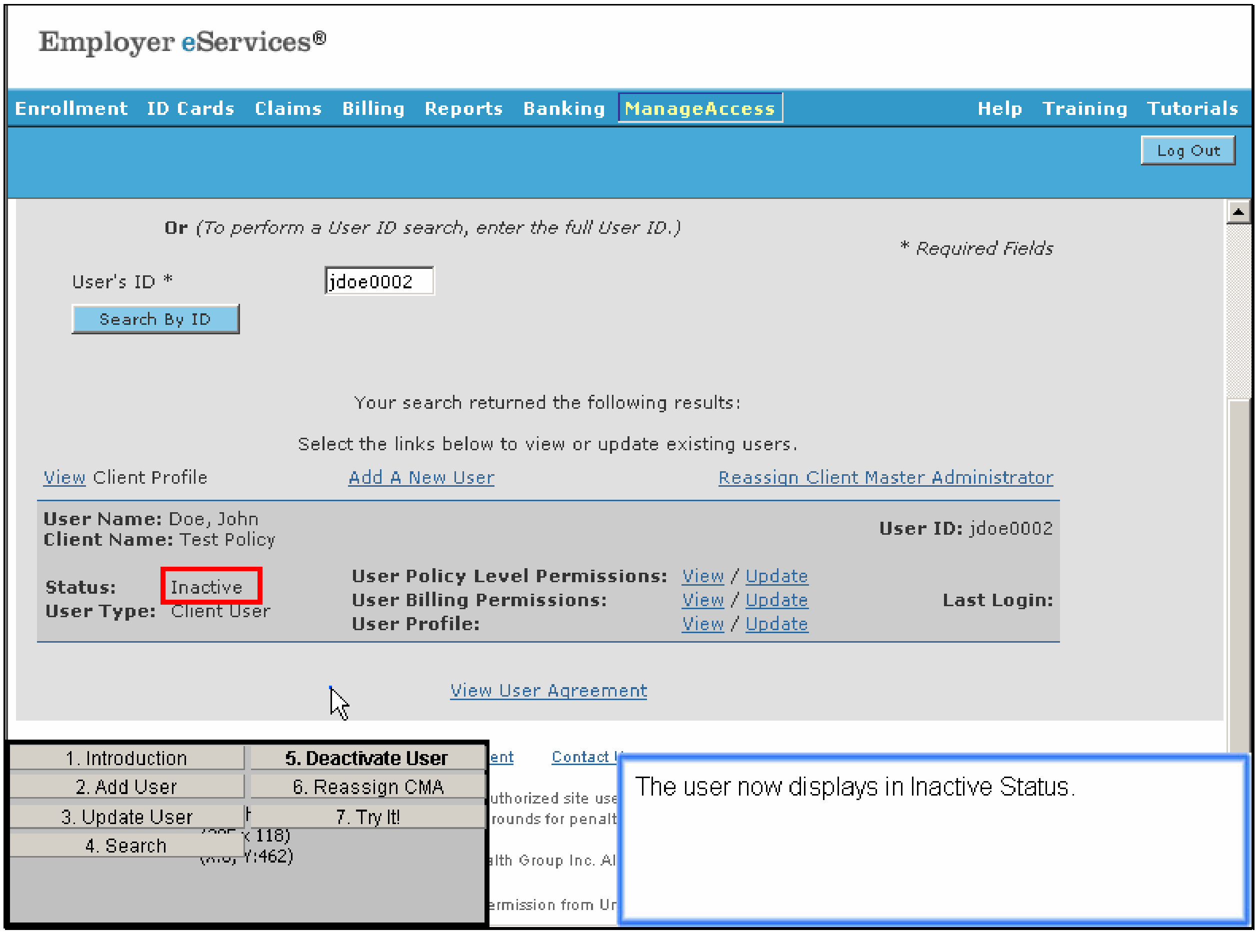
To deactivate the user, click the Inactive radio button.

060



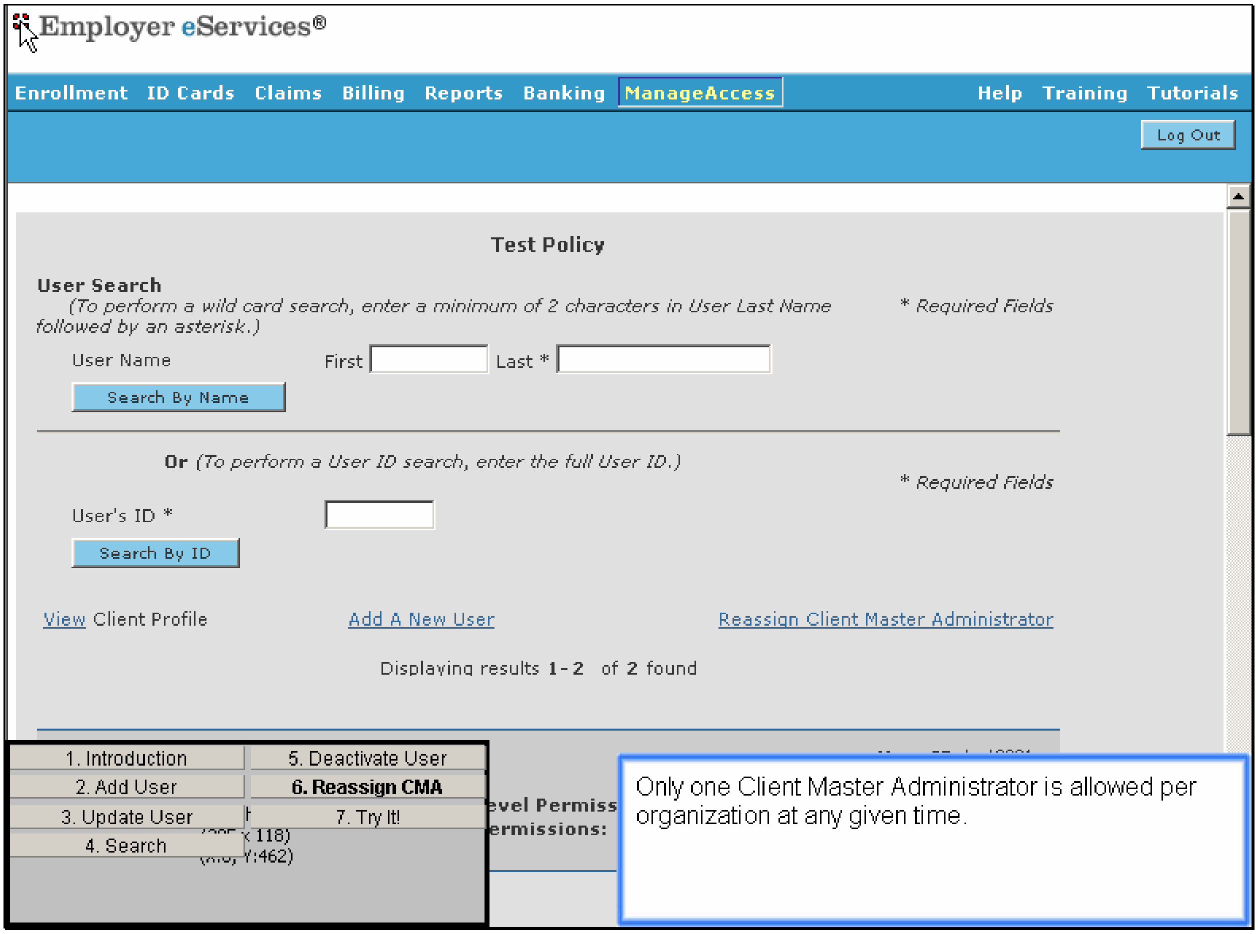
Next, click the Submit button.

061



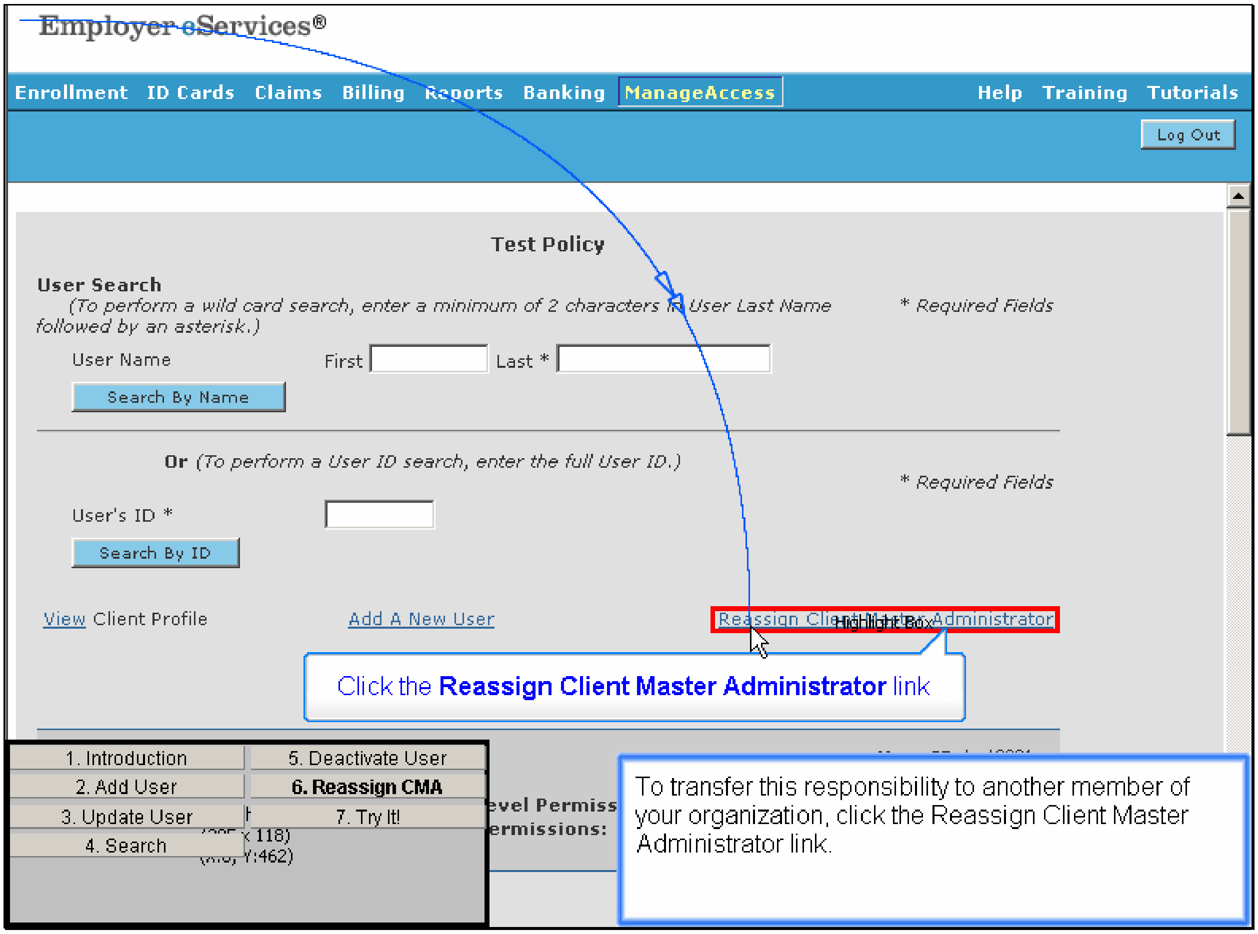
The user now displays in Inactive Status.

062



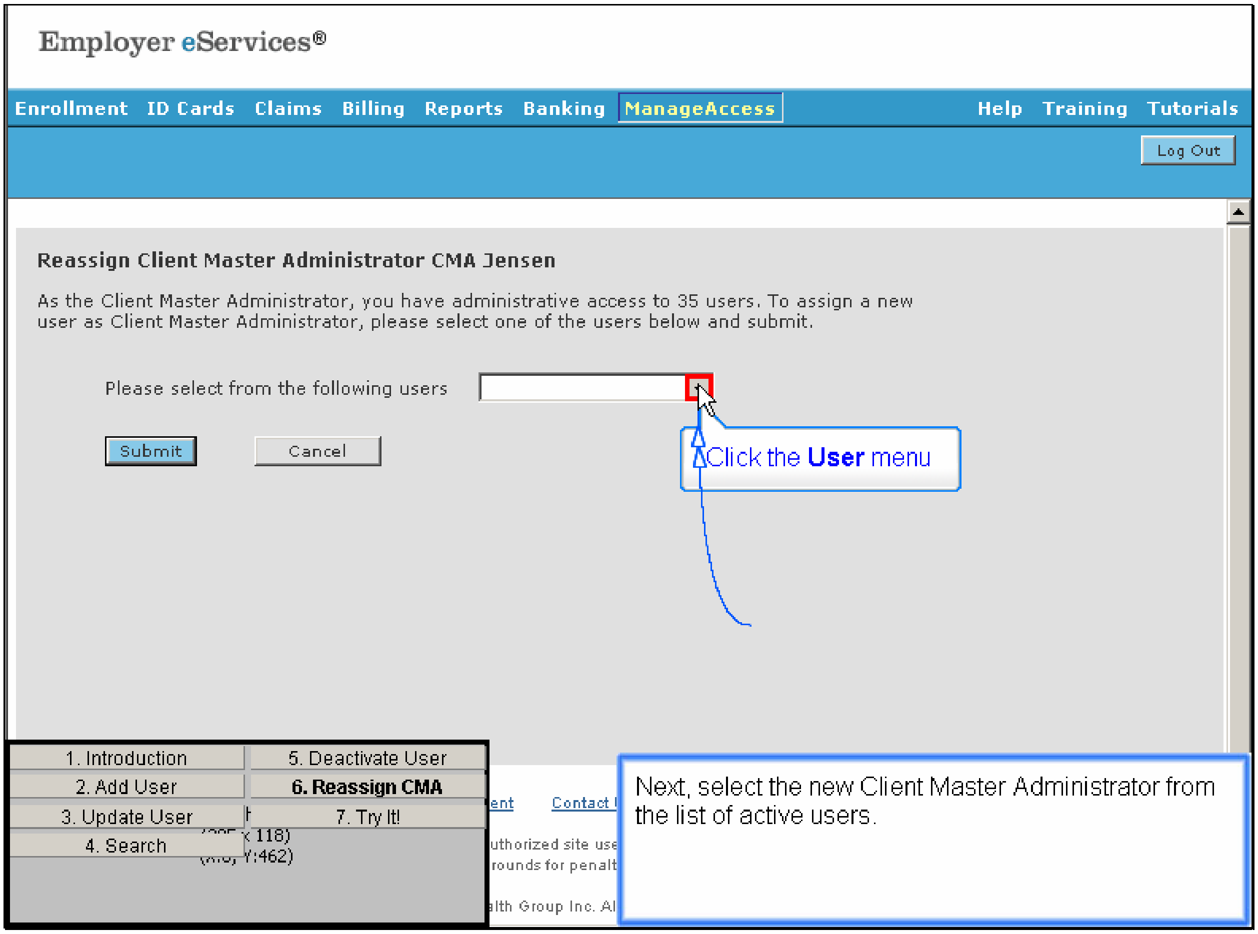
Only one Client Master Administrator is allowed per organization at any given time.

063



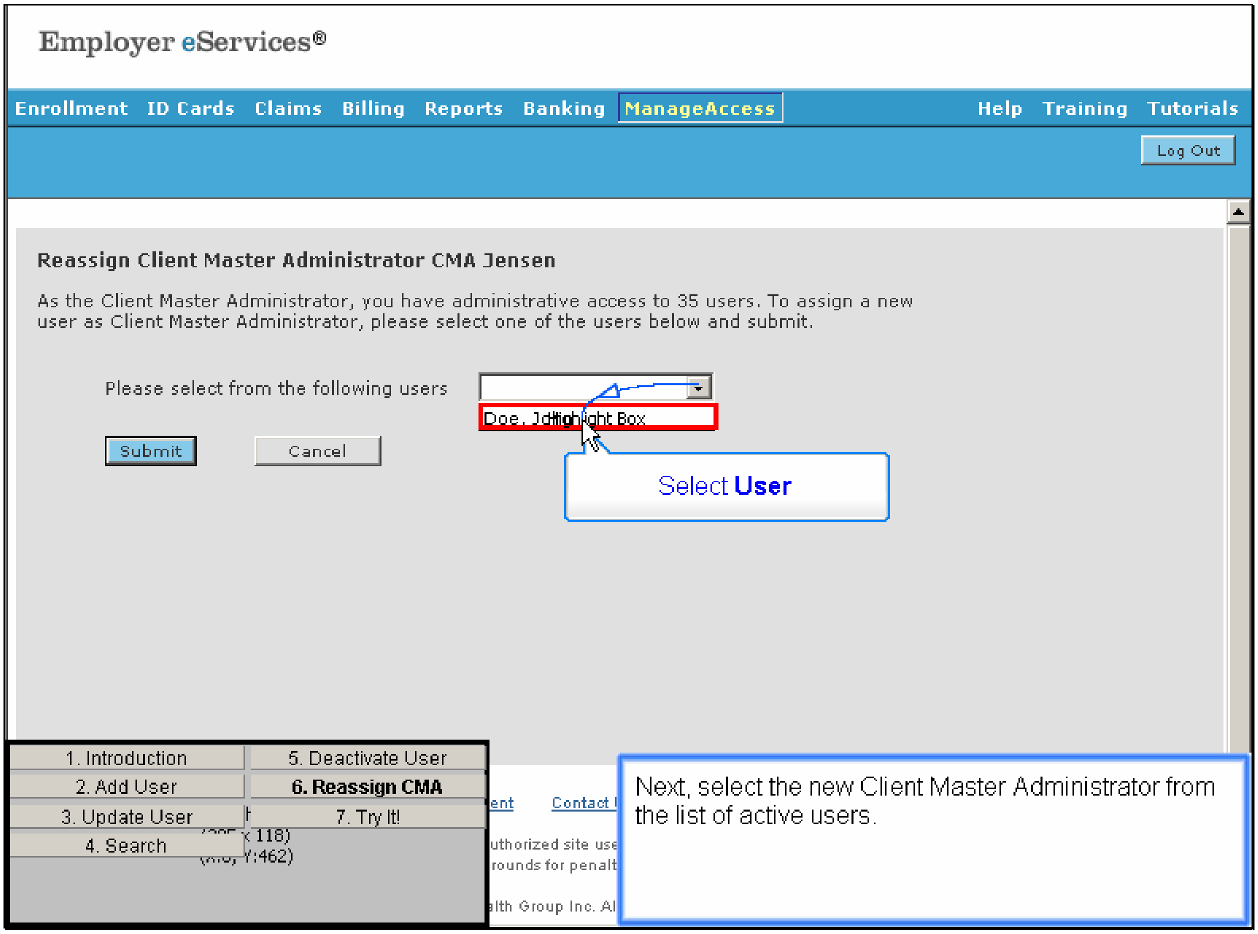
To transfer this responsibility to another member of your organization, click the Reassign Client Master Administrator link.

064



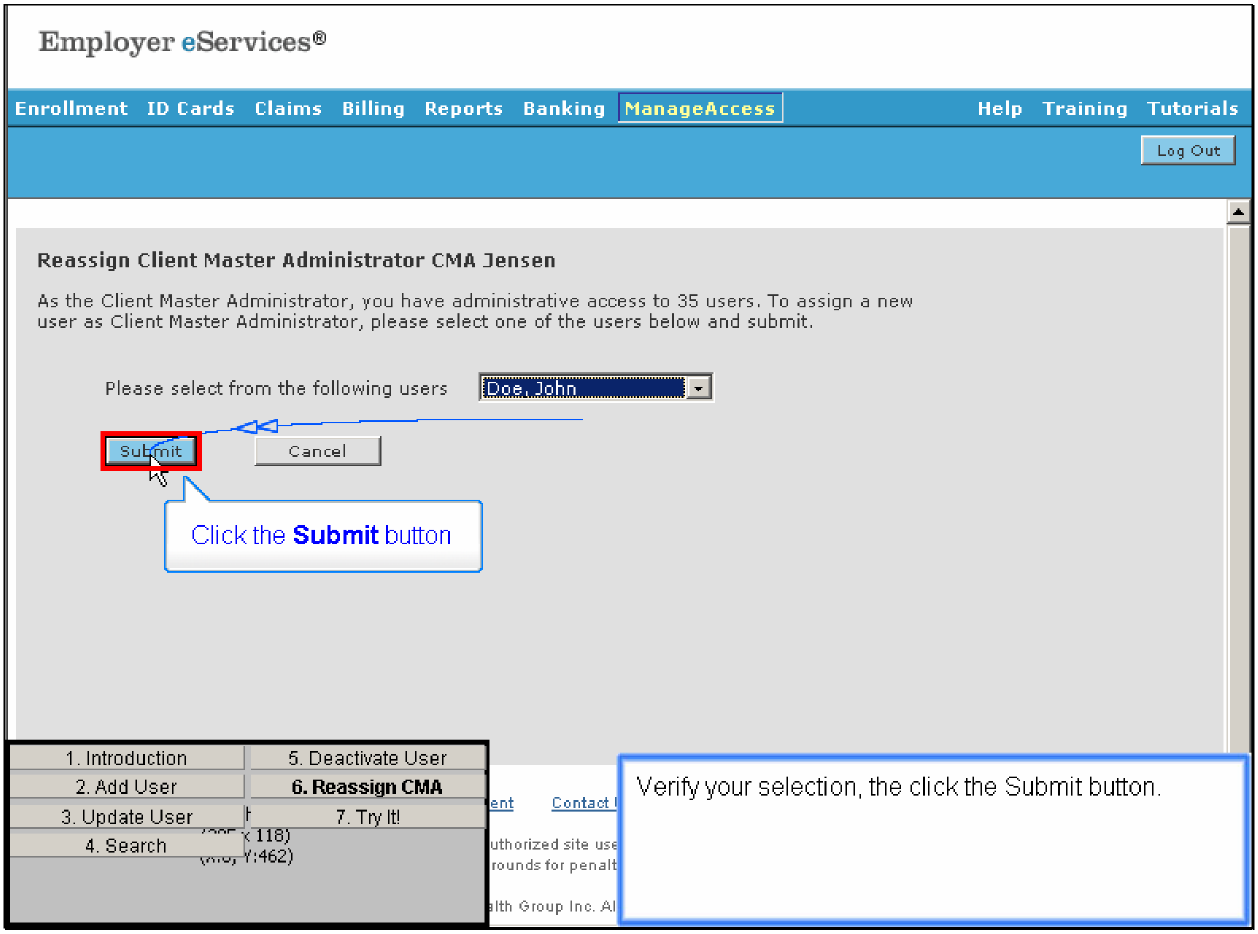
Next, select the new Client Master Administrator from the list of active users.

065



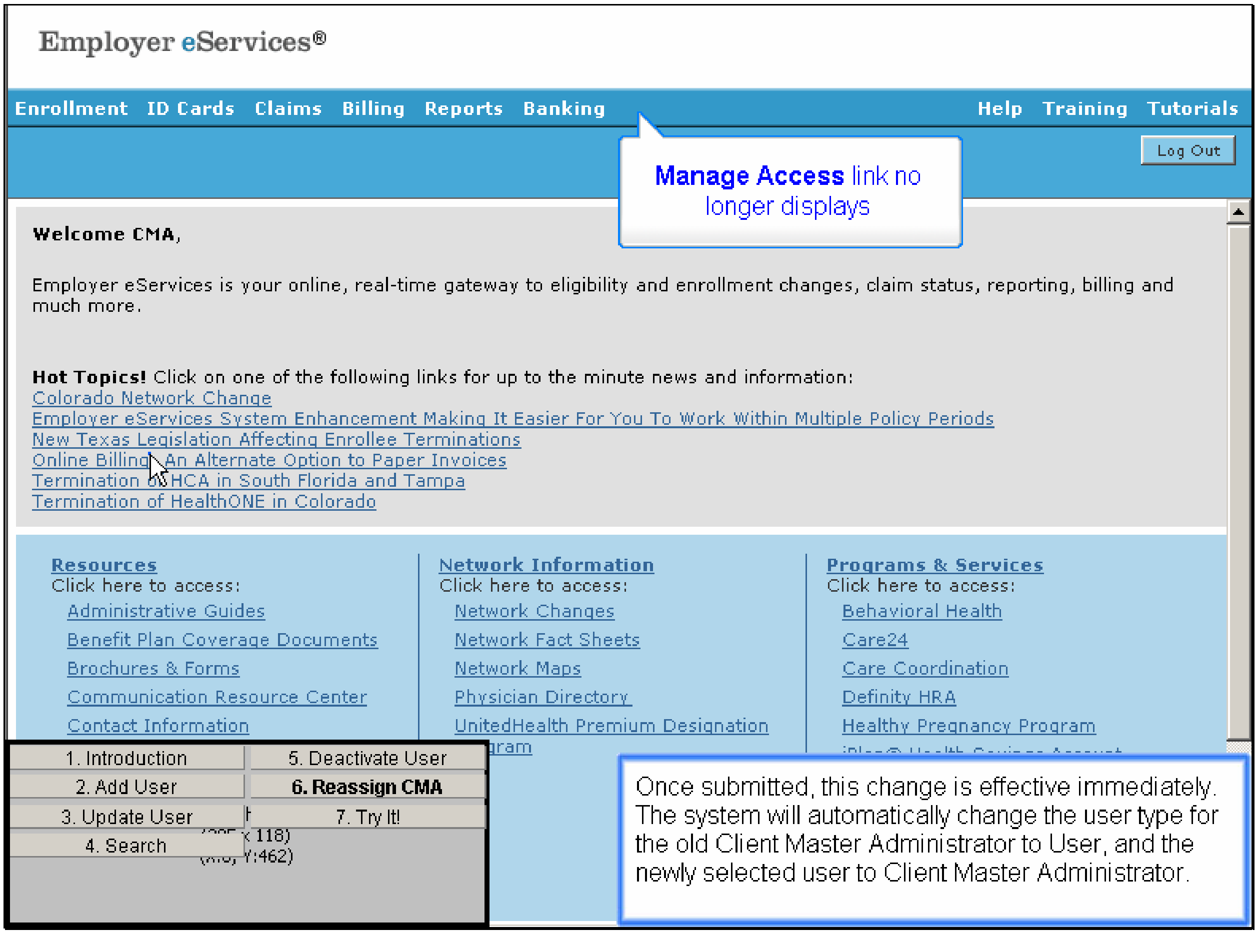
Next, select the new Client Master Administrator from the list of active users.

066



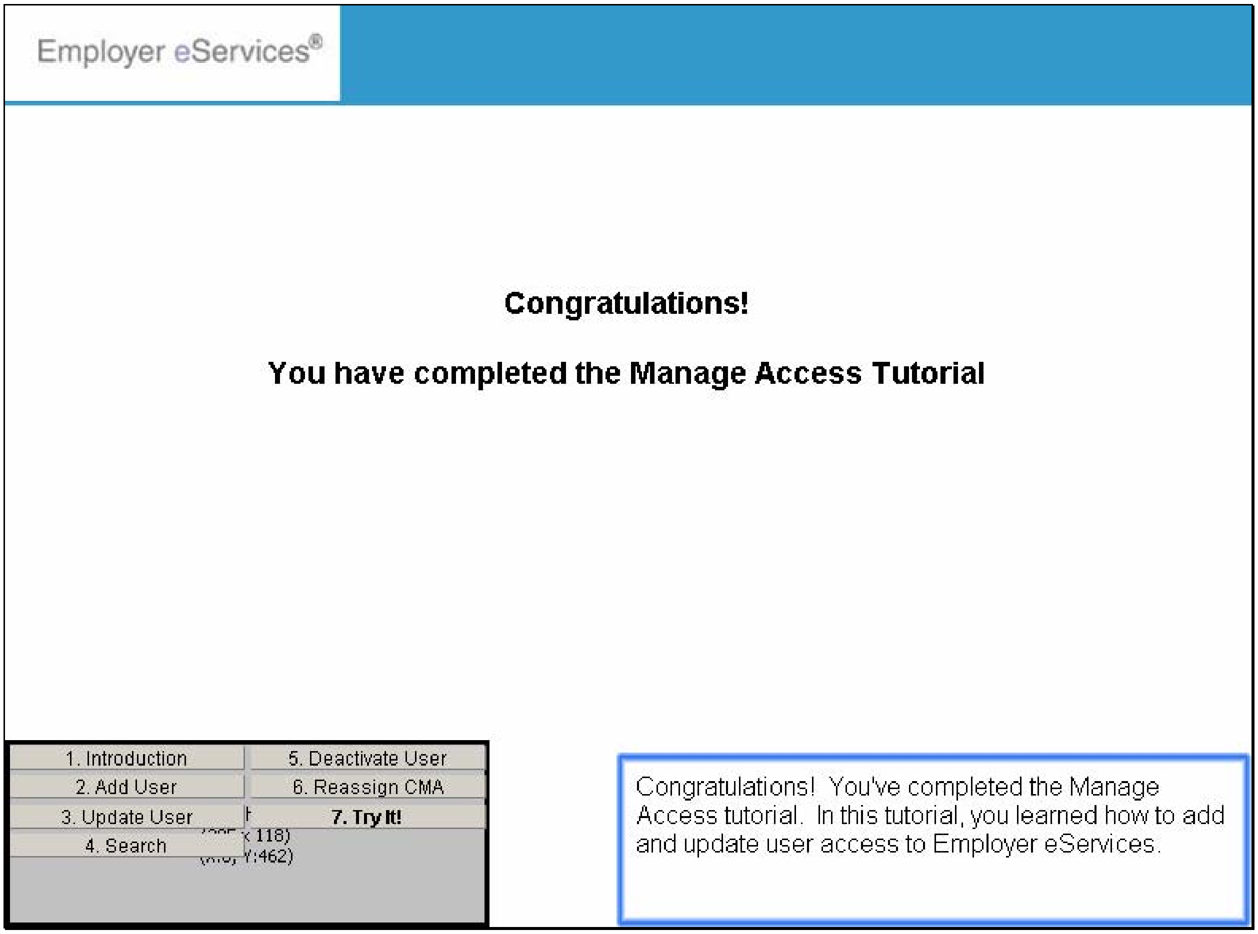
Verify your selection, the click the Submit button.

067



Once submitted, this change is effective immediately. The system will automatically change the user type for the old Client Master Administrator to User, and the newly selected user to Client Master Administrator.

068



Congratulations! You've completed the Manage Access tutorial. In this tutorial, you learned how to add and update user access to Employer eServices.