Only Broker Users can access the Broker User management module to view a complete list of active users, modify user details, send a temporary password to another user, and create new users. The User Management screen also includes an interactive grid used to select a user and view all users' Creation and Last login dates.

To access the Broker user management module:
1. In the insured portal, click the Broker Space button in the top right corner of the Portal.
2. Hover over the Action icon from the top menu.
3. Click on User management.

User management buttons

Add group (optional): allows better internal organization of users. These groups can be used to apply filters. Groups are for your own organization’s administration and do not affect user functionality. When you export a user list, the group you have selected for each users will be displayed in a Group column.

Add: creates a new user.

Modify: allows changes to be made to user selected from the list.

Send password: sends a notification to the selected user containing a new temporary password.

Export: allows you to export the user list.

Broker User Management

Only Broker Users can access the Broker User management module to view a complete list of active users, modify user details, send a temporary password to another user, and create new users. The User Management screen also includes an interactive grid used to select a user and view all users’ Creation and Last login dates.

To access the Broker user management module:
1. In the insured portal, click the Broker Space button in the top right corner of the Portal.
2. Hover over the Action icon from the top menu.
3. Click on User management.

Create a New Broker User

To create a new user:
1. Access the Broker User management module.
2. Click the Add button.
3. Complete all required fields, including:
   - User ID
   - Last Name
   - Date Format
   - Title
   - Active
   - Email address
   - First Name
   - Language
4. Complete any additional fields, if applicable.
5. Select the appropriate user profile(s) from the Profiles section on the left box right.
6. Click the Add button to add these profiles to the user’s profile.
7. Select the required Policies for the user from the left box.
8. Click the Add button to add these Policies to the user’s profile.

NOTE: If you select nothing from the Policies list, by default the user will have access to all policies.

9. Click the Submit button.
Modify a User

To modify a user:

1. Access the Broker User management module:
2. Select the user profile from the list.
3. Click the Modify button.
4. Make changes as appropriate.
5. Click the Submit button.

You can adjust any of the features detailed in the previous section, as well as adjust some additional options.

Policy Holder User Management

Both Broker and Policy Holder users can access the Policy Holder User management module to view a complete list of active users, modify user details, send a temporary password to another user, and create new users. The User Management screen also includes an interactive grid used to select a user and view all users’ Creation and Last login dates.

To access the Policy Holder User management module:

1. Ensure you are in the Insured portal.
2. Hover over the Action icon from the top menu.
3. Click on User management.

User management buttons

From the Policy Holder User management module, you can perform a variety of functions using the buttons at the bottom of the page. These options include:

- **Add group (optional)**: allows better internal organisation of users. These groups can be used to apply filters. Groups are for your own organization’s administration and do not affect user functionality. When you export a user list, the group you have selected for each user’s will be displayed in a Group column.
- **Add**: creates a new user.
- **Modify**: allows changes to be made to user selected from the list.
- **Send password**: sends a notification to the selected user containing a new temporary password.
- **Export**: allows you to export the user list.

Create New User

To create a new user:

1. Access the Policy Holder User management module.
2. Click the Add button.

These options include:

- **Active** checkbox: if the box is checked, the user’s profile is active. Removing the checkmark will deactivate the user’s account and prevent them from accessing the portal.
- **Closed** checkbox: marking this active will completely block the user’s access to the portal.

**NOTE:** If the user is Closed, they cannot connect to the portal or receive password link via the Send Password button.

3. Complete all required fields, including:
   - User ID
   - Last Name
   - Date Format
   - Title
   - Active
   - Email address
   - First Name
   - Language

4. Complete any additional fields, if applicable.
5. Select the appropriate user profile(s) from the Profiles section on the left box.
6. Click the Add button to add these profiles to the user’s profile.
7. Select the required Policies for the user from the left box.

**NOTE:** If you select nothing from the Policies list, by default the user will have access to all policies.

8. Click the Add button to add these policies to the user’s profile.
9. Click the Submit button.

Modify a User

To modify a user:

1. Access the Policy Holder User management module:
2. Select the user profile from the list.
3. Click the Modify button.
4. Make changes as appropriate.
5. Click the Submit button.

All existing users can adjust any of the features detailed in the previous section, as well as adjust some additional options. These options include:

- **Active** checkbox: if the box is checked, the user’s profile is active. Removing the checkmark will deactivate the user’s account and prevent them from accessing the portal.
- **Closed** checkbox: marking this active will completely block the user’s access to the portal.

**NOTE:** If the user is Closed, they cannot connect to the portal or receive password link via the Send Password button.