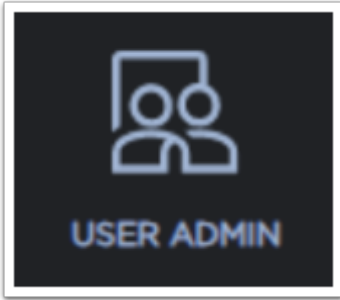


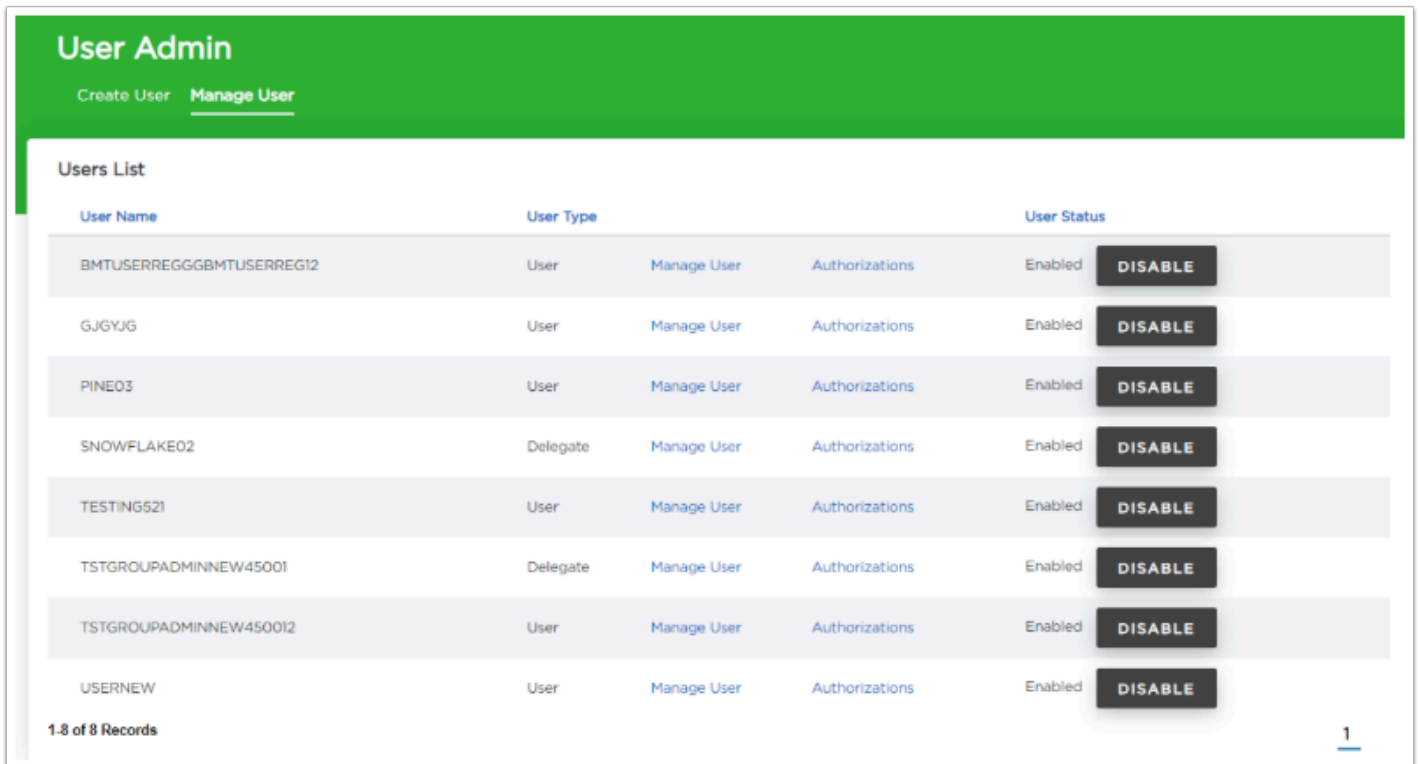
# How to Managing Users

In order to manage existing users, the Admin or Delegate logs in and then navigates to the 'User Admin' icon in the left hand navigation.



Once on this page, they can switch to the 'Manage User' tab to start the workflow where they will see the list of their users.

**i** If the User Type = Delegate, those users can ONLY be seen and managed by the Admin.



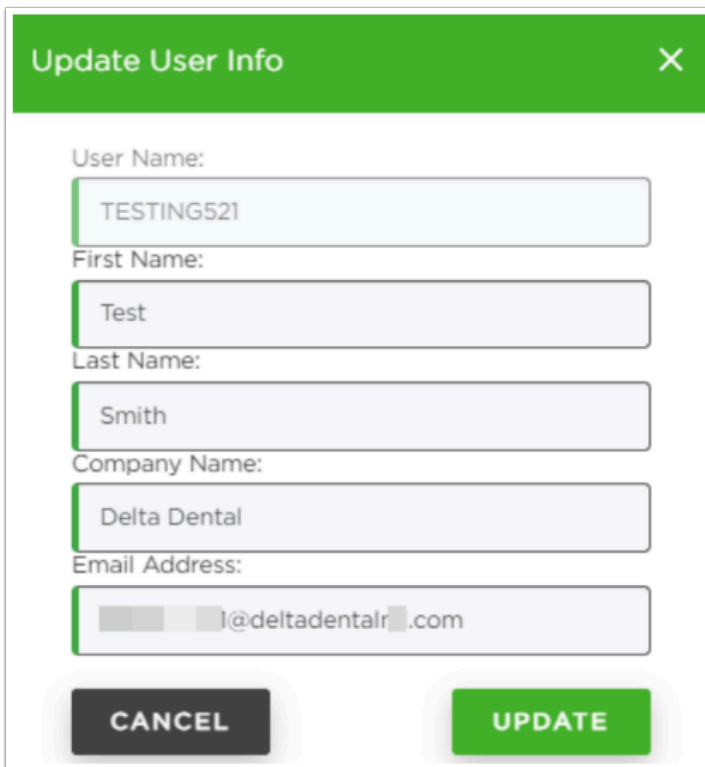
The screenshot shows the 'User Admin' interface. At the top, there is a green header with the title 'User Admin' and two tabs: 'Create User' and 'Manage User'. Below the header is a table titled 'Users List'. The table has columns for 'User Name', 'User Type', 'Manage User', 'Authorizations', and 'User Status'. Each row represents a user, and the 'User Status' column contains a 'DISABLE' button. The table shows 8 records, with the first 7 rows visible. The 'User Status' column for all users is 'Enabled'.

User Name	User Type	Manage User	Authorizations	User Status
BMTUSERREGGBMTUSERREG12	User	Manage User	Authorizations	Enabled <b>DISABLE</b>
GJGYJG	User	Manage User	Authorizations	Enabled <b>DISABLE</b>
PINE03	User	Manage User	Authorizations	Enabled <b>DISABLE</b>
SNOWFLAKE02	Delegate	Manage User	Authorizations	Enabled <b>DISABLE</b>
TESTING521	User	Manage User	Authorizations	Enabled <b>DISABLE</b>
TSTGROUPADMINNEW45001	Delegate	Manage User	Authorizations	Enabled <b>DISABLE</b>
TSTGROUPADMINNEW450012	User	Manage User	Authorizations	Enabled <b>DISABLE</b>
USERNEW	User	Manage User	Authorizations	Enabled <b>DISABLE</b>

1-8 of 8 Records 1

From this list, the user could select 'Manage User' to update details about the user.

! 'User Name' is not a field that can be updated.

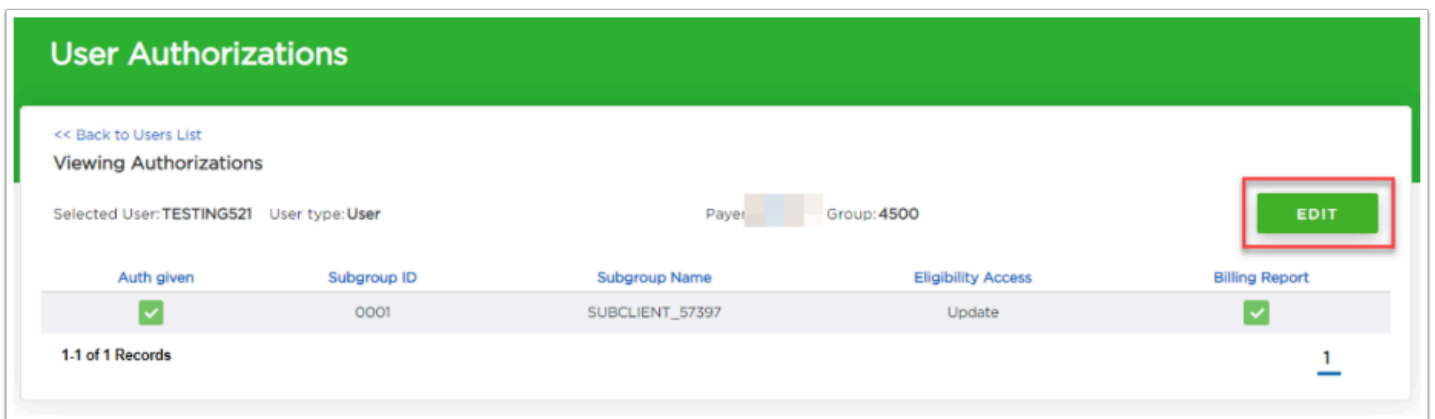


The 'Update User Info' form contains the following fields:

- User Name: TESTING521
- First Name: Test
- Last Name: Smith
- Company Name: Delta Dental
- Email Address: [redacted]@deltadentalr.com

Buttons: CANCEL, UPDATE

A user could also select 'Authorizations' in order to view that user's authorizations or to start the workflow to Edit their authorizations.



**User Authorizations**

<< Back to Users List

Viewing Authorizations

Selected User: TESTING521 User type: User Payer: [redacted] Group: 4500

**EDIT**

Auth given	Subgroup ID	Subgroup Name	Eligibility Access	Billing Report
✓	0001	SUBCLIENT_57397	Update	✓

1-1 of 1 Records 1

After clicking 'Edit,' the user is given options in how they wish to modify their authorizations.

## User Authorizations

### Managing Authorizations

Selected User: **TESTING521** User type: **User** Payer: Group: **4500**

Select for all SubGroups  
 Select to customize SubGroups  
 Create Delegate - a user who can create users and manage authorizations on your behalf  
 Revoke authorizations for the group

After clicking the radio button for 'Select for all Subgroups' the page expands and the user can make the necessary changes.

## User Authorizations

### Managing Authorizations

Selected User: **TESTING521** User type: **User** Payer: Group: **4500**

Select for all SubGroups  
 Select to customize SubGroups  
 Create Delegate - a user who can create users and manage authorizations on your behalf  
 Revoke authorizations for the group

<input type="checkbox"/>	Subgroup ID	Subgroup Name	Eligibility Access	Billing Report
<input checked="" type="checkbox"/>	0001	SUBCLIENT_57397	Update	<input checked="" type="checkbox"/>

1-1 of 1 Records 1

**i** In this instance, the ability to view Billing Reports was removed.

## User Authorizations

### Managing Authorizations

Selected User: TESTING521 User type: User Payer: [Payer Icon] Group: 4500

Select for all SubGroups  
 Select to customize SubGroups  
 Create Delegate - a user who can create users and manage authorizations on your behalf  
 Revoke authorizations for the group

<input type="checkbox"/>	Subgroup ID	Subgroup Name	Eligibility Access	Billing Report <input type="checkbox"/>
<input checked="" type="checkbox"/>	0001	SUBCLIENT_57397	Update	<input type="checkbox"/>

1-1 of 1 Records

1

After saving, the use can view the new authorizations and then use the 'Back to Users List' to manage more users.

[<< Back to Users List](#)

### Viewing Authorizations

Selected User: TESTING521 User type: User Payer: [Payer Icon] Group: 4500

Auth given	Subgroup ID	Subgroup Name	Eligibility Access	Billing Report
<input checked="" type="checkbox"/>	0001	SUBCLIENT_57397	Update	<input type="checkbox"/>

1-1 of 1 Records

1

The last thing that can be done on behalf of a user is to 'Enable' or 'Disable' them.

### User Status

Enabled	<input type="button" value="DISABLE"/>
Enabled	<input type="button" value="DISABLE"/>
Disabled	<input type="button" value="ENABLE"/>
Disabled	<input type="button" value="ENABLE"/>
Enabled	<input type="button" value="DISABLE"/>

💡 When disabling a user, normally the circumstances are if;

1. They have moved departments
2. Parted ways with the company
3. Any other reason that they should no longer have the ability to log into the toolkit