Agent/Group Identity Manager - Desk Level Procedures

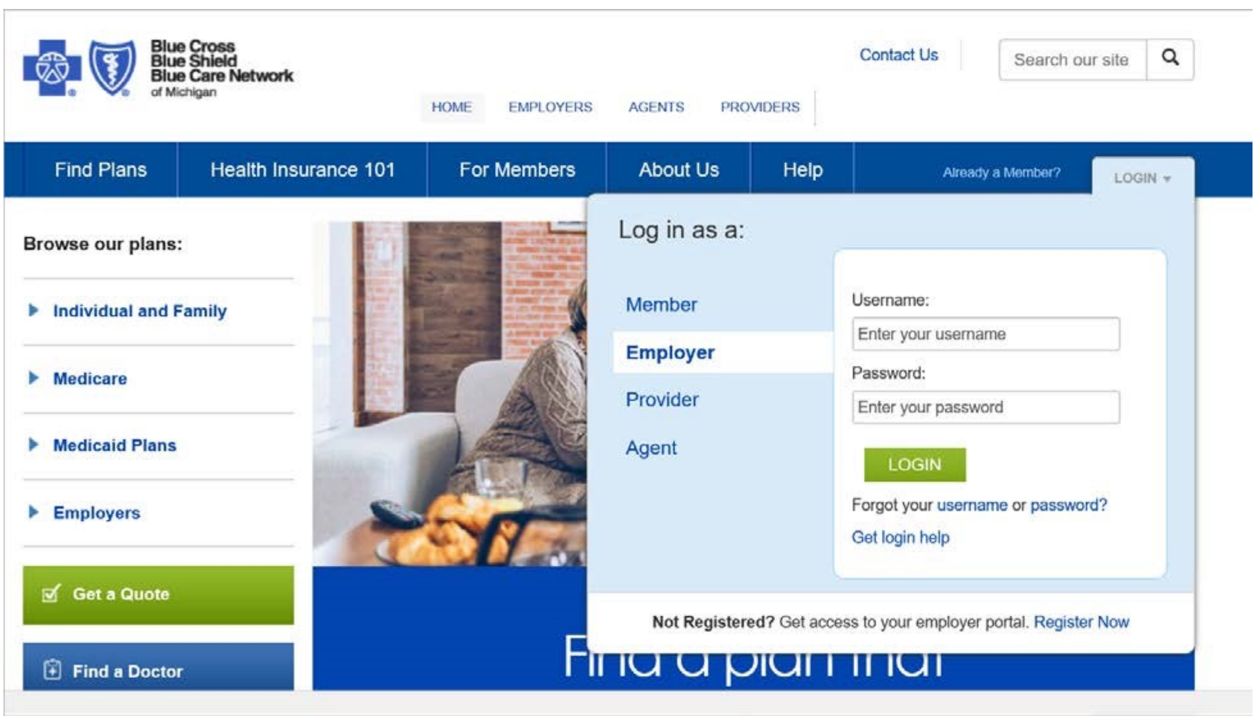
Process Tasks: CTRL + click the desired task to view the topic.

Task Number	Task Name

1 Non-Secured Procedures

As a user, there are several tasks you can perform from the Login screen at BCBSM.com. The tasks you can perform are listed below:

- Registering for Secured Services - Principal Administrators
- Resetting your password
- Recovering your user name



Task 1 **Registering for Secured Services - Principal Administrators**

As an Administrator, you can register for access to Secured Services as a group, agent, or association/chamber.

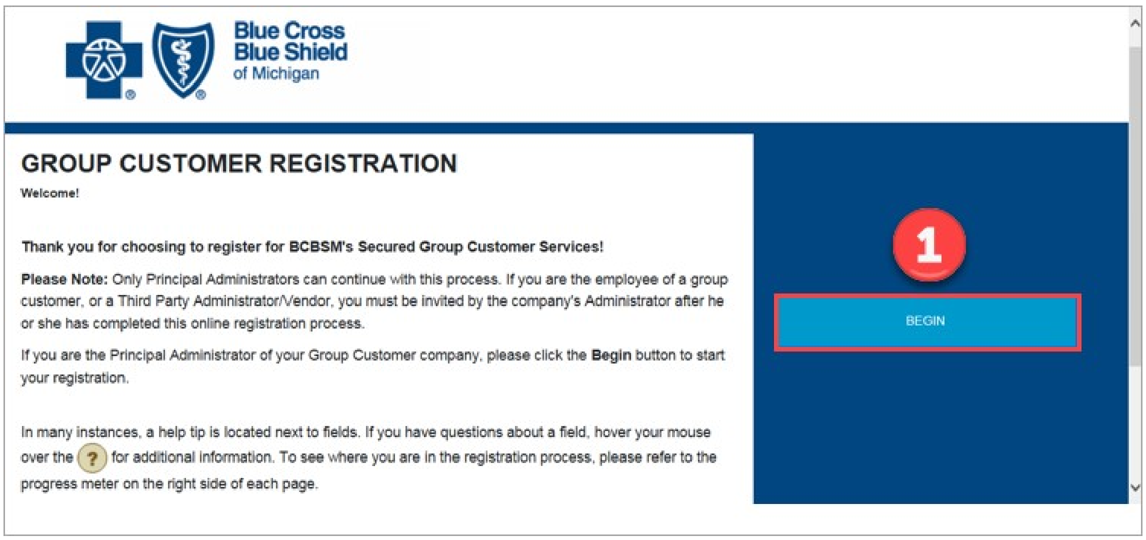
- **Note:** This task assumes you have selected **Register Now** under Login for Employer or Agent at BCBSM.com.

Complete the following steps to register for Secured Services – Principal Administrator.

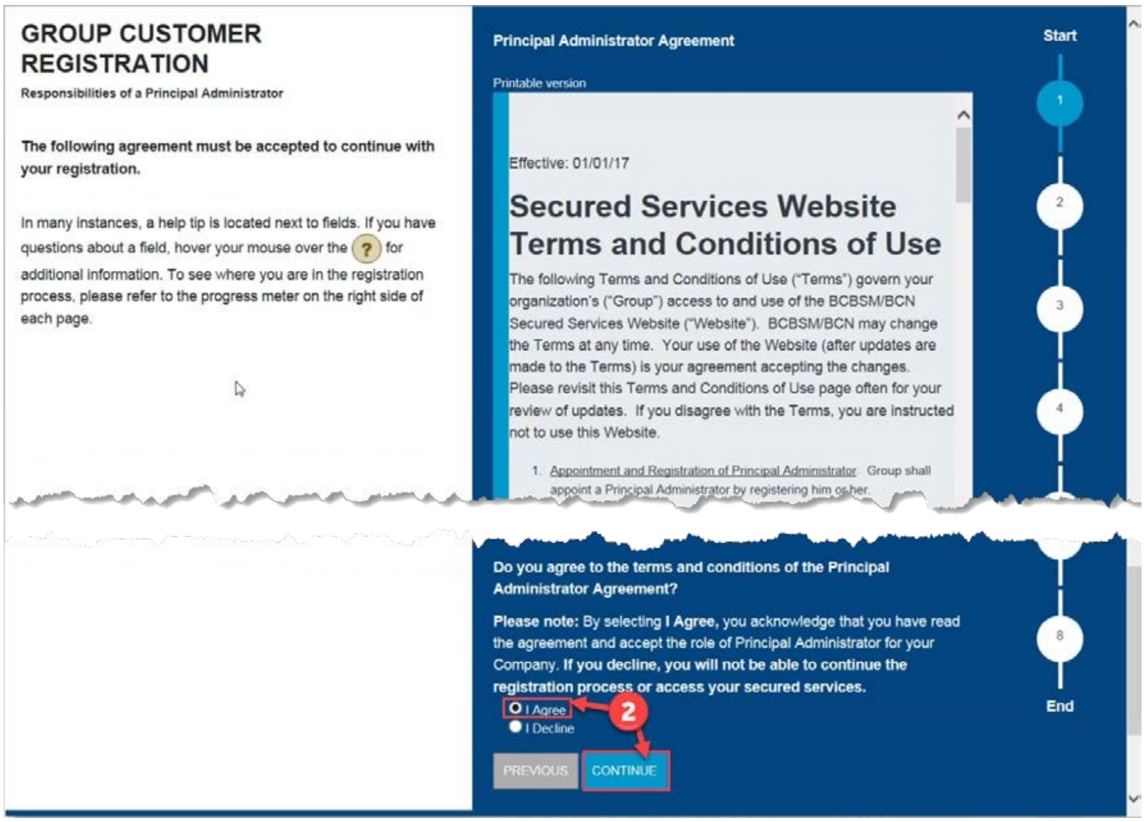
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>

Click **Begin**.

Note: The screens displayed in this task are for groups. The agent and chamber screens are similar.



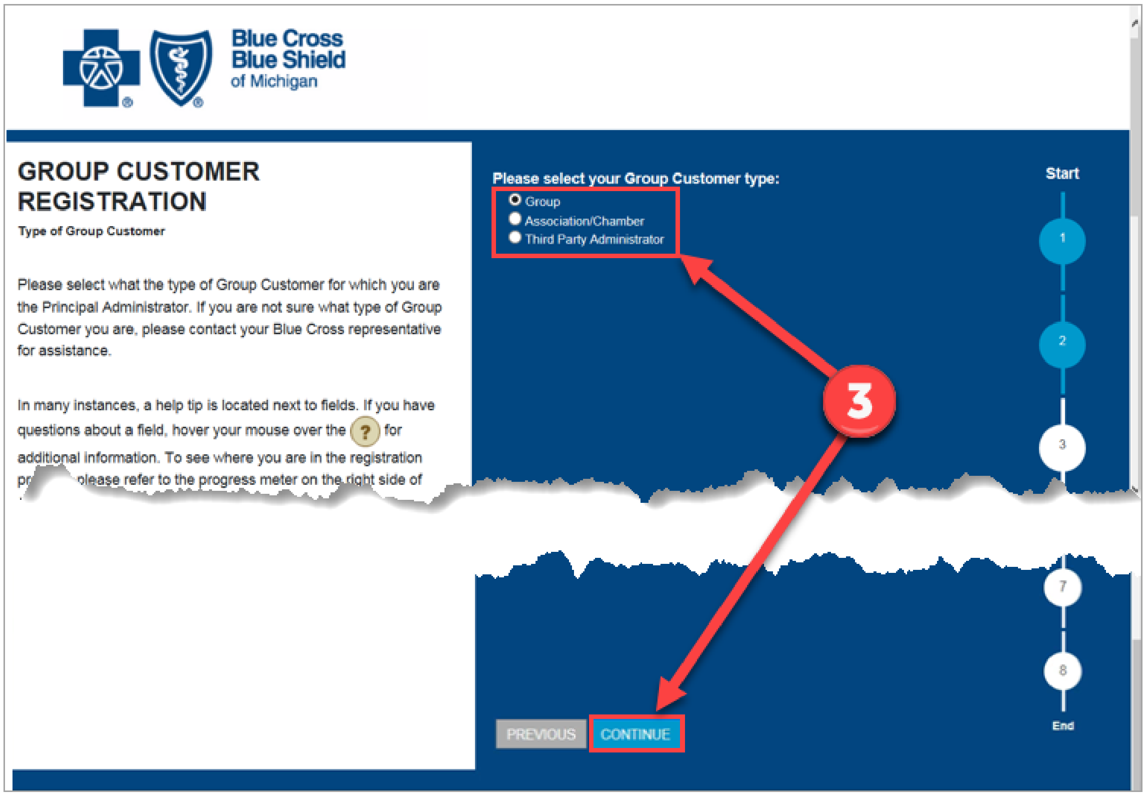
</td></tr>
<tr><td>2</td><td>Select the I Agree radio button and click Continue.</td></tr>
</table>

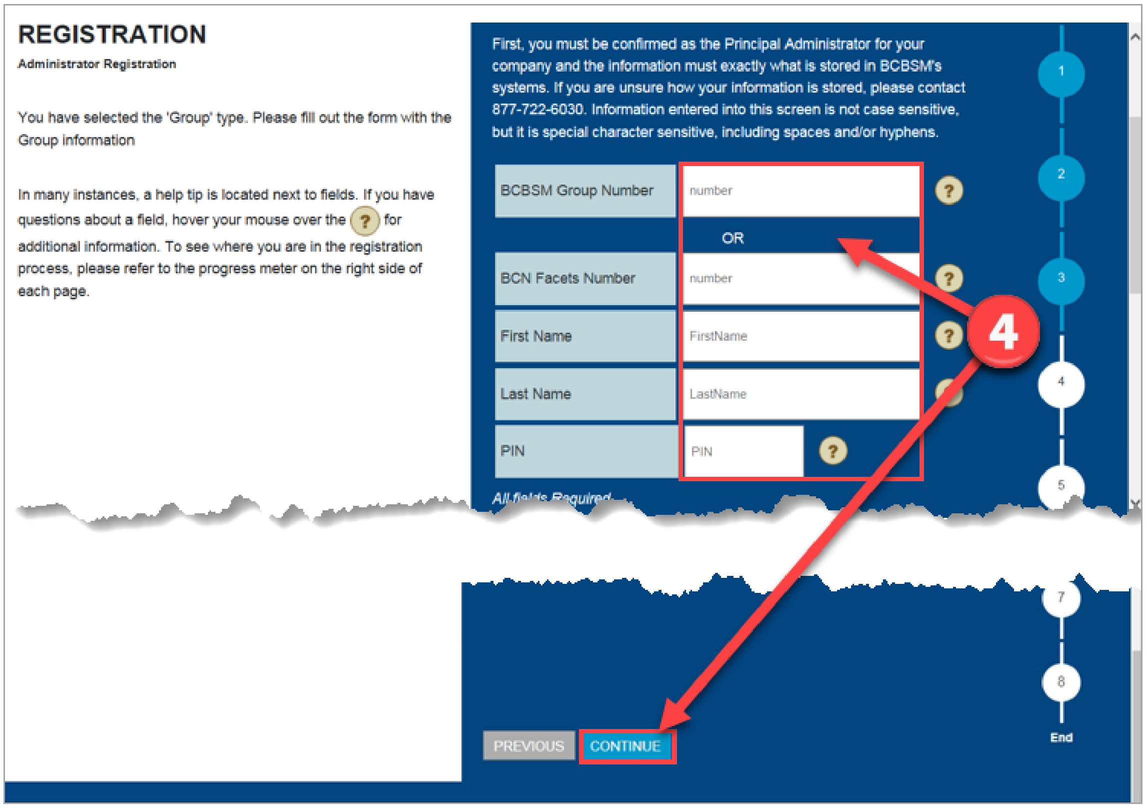

GROUP CUSTOMER REGISTRATION
Responsibilities of a Principal Administrator
The following agreement must be accepted to continue with your registration.
In many instances, a help tip is located next to fields. If you have questions about a field, hover your mouse over the ? for additional information. To see where you are in the registration process, please refer to the progress meter on the right side of each page.
Principal Administrator Agreement
Printable version
Effective: 01/01/17
Secured Services Website Terms and Conditions of Use
The following Terms and Conditions of Use ("Terms") govern your organization's ("Group") access to and use of the BCBSM/BCN Secured Services Website ("Website"). BCBSM/BCN may change the Terms at any time. Your use of the Website (after updates are made to the Terms) is your agreement accepting the changes. Please revisit this Terms and Conditions of Use page often for your review of updates. If you disagree with the Terms, you are instructed not to use this Website.
1. Appointment and Registration of Principal Administrator. Group shall appoint a Principal Administrator by registering him or her.
Do you agree to the terms and conditions of the Principal Administrator Agreement?
Please note: By selecting I Agree, you acknowledge that you have read the agreement and accept the role of Principal Administrator for your Company. If you decline, you will not be able to continue the registration process or access your secured services.
I Agree
I Decline
2
PREVIOUS
CONTINUE
Start
1
2
3
4
8
End

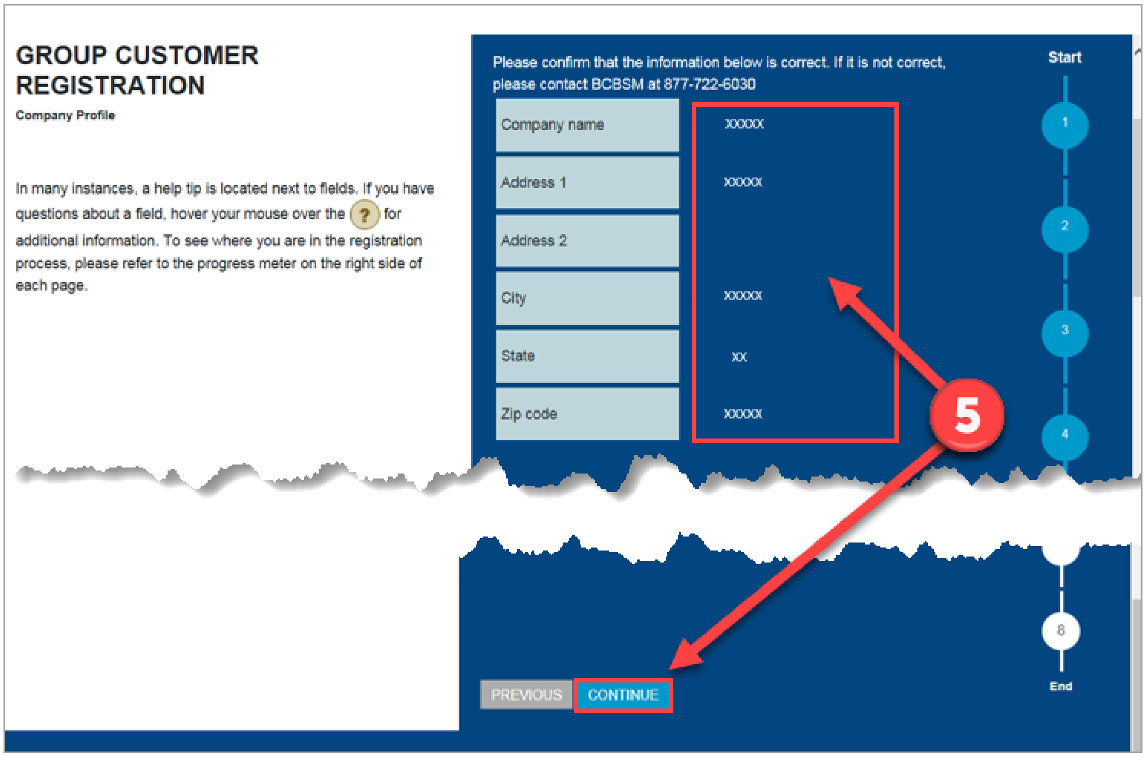
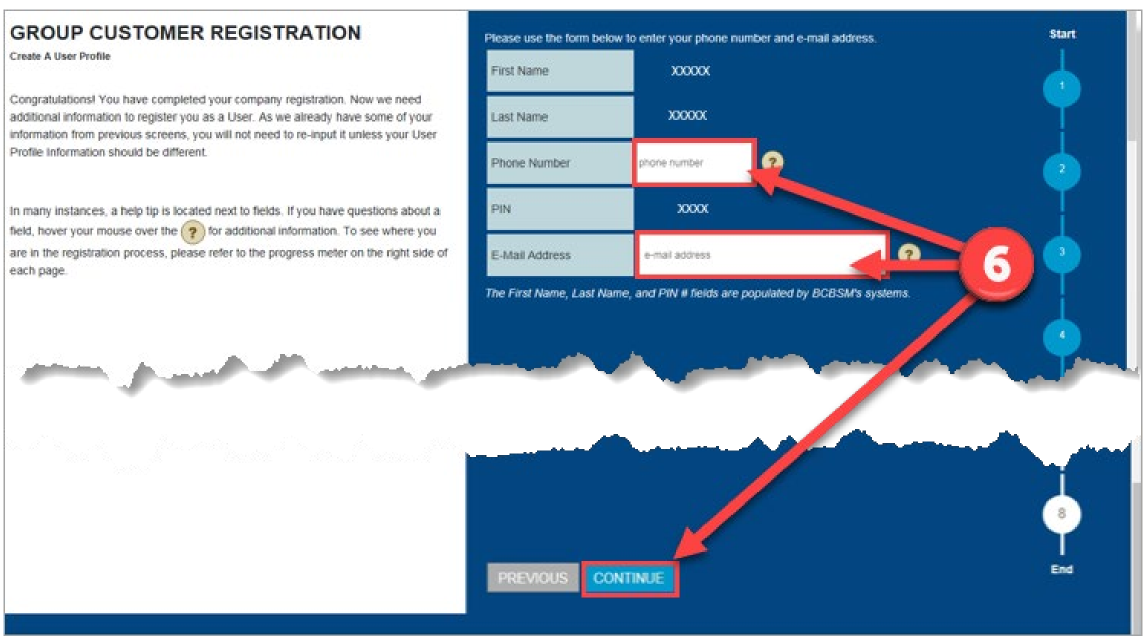
3

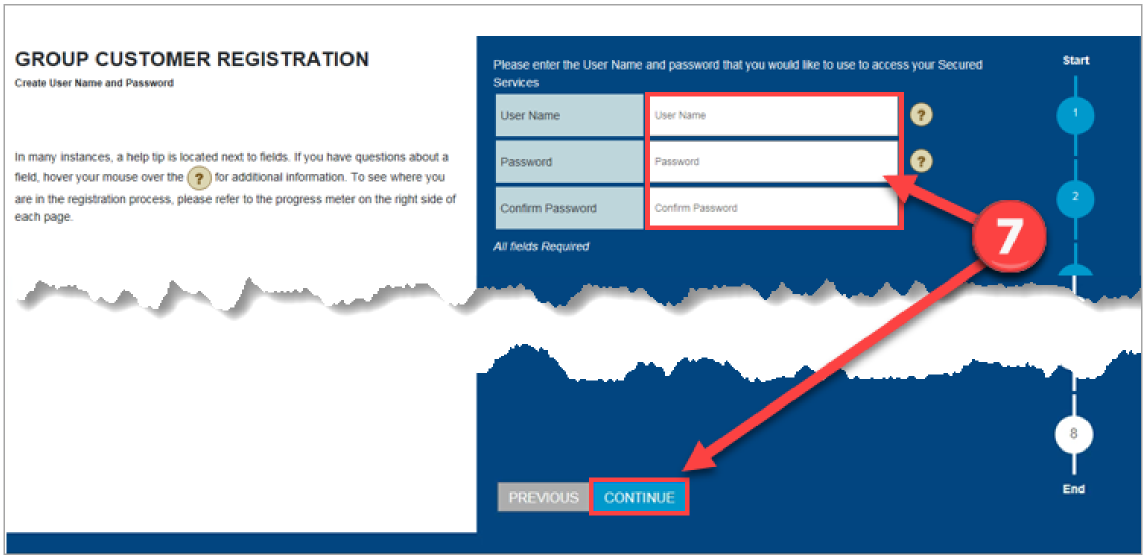
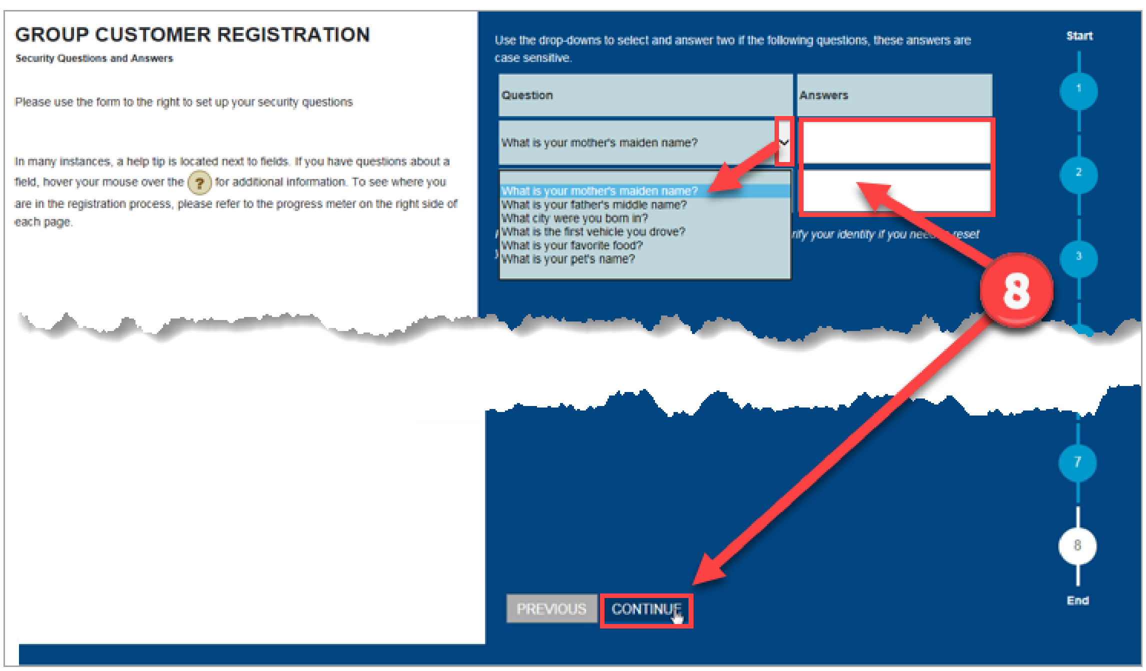
Select the **Group Customer Type** radio button and click **Continue**.

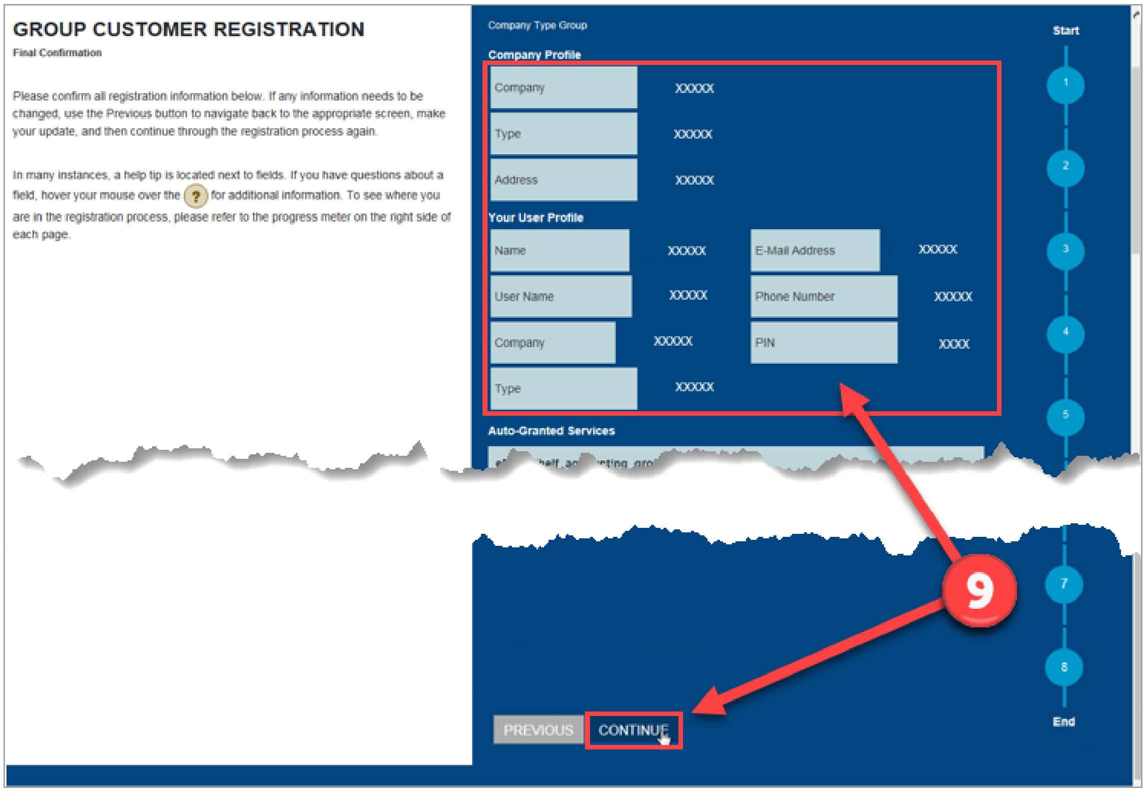
Note: In this example the **Group** radio button is selected.



4	Type one of the following **BCBSM** G**roup and Division number** or **BCN Group Number**, **First Name**, **Last Name**, and **PIN** and then click **Continue**. **Note**: Pin is the last four digits of the Tax Identification Number (TIN) **Note:** This step may take time, while the entered information is verified. Unless you receive an error do not back out of this step. 
5	Confirm the information is correct and click **Continue**.

	
6	Type the **Phone Number** and **Email Address**, and then click **Continue**. 
7	Create a **User Name** and **Password,** and then click **Continue**.

	
8	Click the two drop-down arrows to select two different security **Questions**, type the **Answers** in the white boxes, and click **Continue**. **Note:** This step may take time. Unless you receive an error do not back out of this step. 
9	Verify that all the information you entered is correct and click **Continue** to complete your registration. **Note:** This step may take time. Unless you receive an error do not back out of this step. You will receive email notification once your registration is processed.

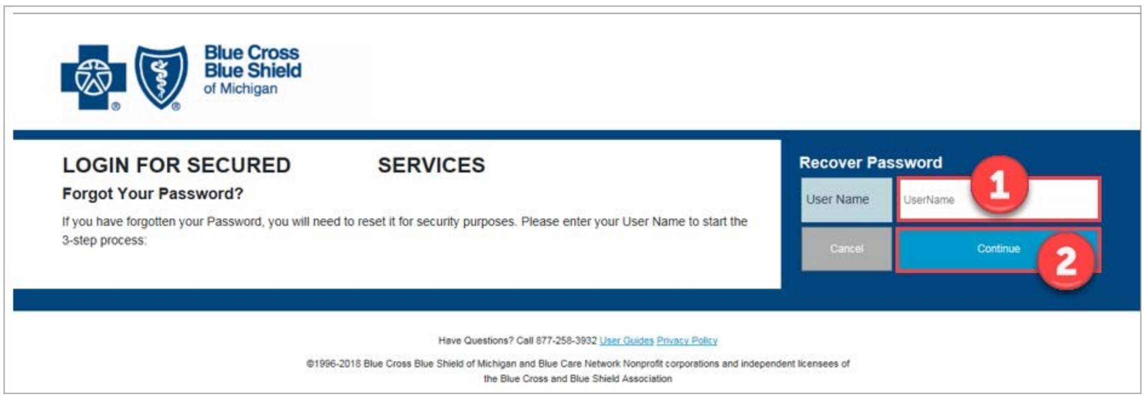
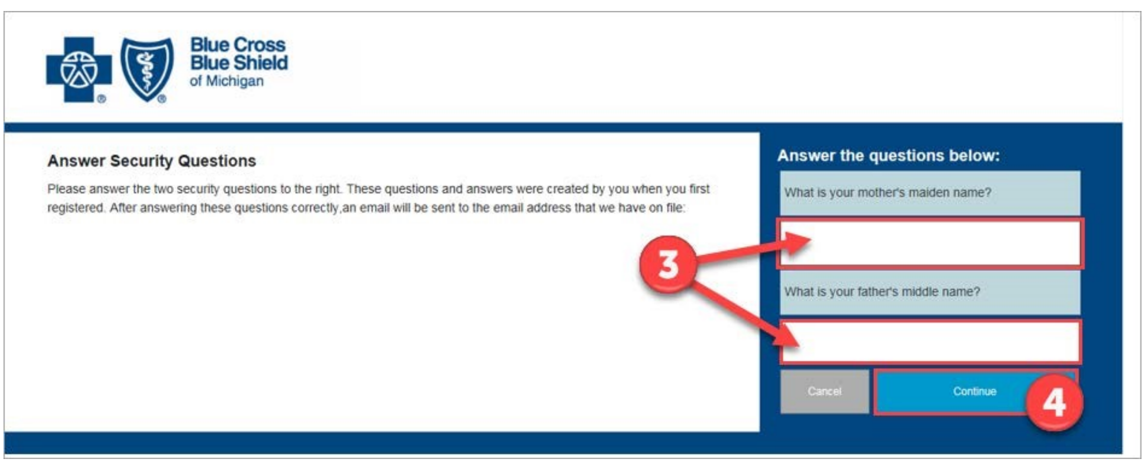

GROUP CUSTOMER REGISTRATION
Final Confirmation
Please confirm all registration information below. If any information needs to be changed, use the Previous button to navigate back to the appropriate screen, make your update, and then continue through the registration process again.
In many instances, a help tip is located next to fields. If you have questions about a field, hover your mouse over the ? for additional information. To see where you are in the registration process, please refer to the progress meter on the right side of each page.
Company Type Group
Company Profile
Company XXXXX
Type XXXXX
Address XXXXX
Your User Profile
Name XXXXX
E-Mail Address XXXXX
User Name XXXXX
Phone Number XXXXX
Company XXXXX
PIN XXXX
Type XXXXX
Auto-Granted Services
Start
1
2
3
4
5
7
8
End
9
PREVIOUS
CONTINUE

Task 2 **Resetting Your Password**

Users can reset their password from the Login screen at BCBSM.com.

- **Note:** This task assumes you have selected **Forgot Your Password** under Login at BCBSM.com.

Complete the following steps to reset your password.

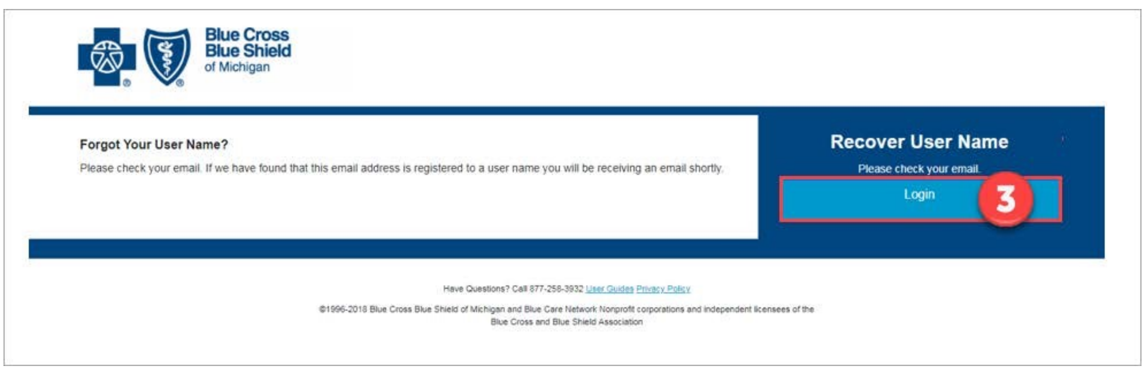
Step	Action
1	Key your **User Name**. 
2	Click **Continue**.
3	Key answers to security questions. 
4	Click **Continue**.

Task 3 **Recovering Your User Name**

Users can recover their User Name from the Login screen at BCBSM.com and have it sent via email.

- **Note:** This task assumes you have selected **Forgot Your User Name** under Login at BCBSM.com.

Complete the following steps to recover your User Name.

Step	Action
1	Key your **Email address**. 
2	Click **Continue**. **Note:** Your User Name will be sent to the email address specified.
3	Click **Login** and continue login process. 

2 Administrator Procedures

BCBSM's Agent and Employer Secured Services administration functionality is designed to support the registration, access management and provisioning processes for users of the secure Agent and Group portal.

At the top of the landing page, there are three links available to assist Administrators.

The three links are:

- Portal Access
- Group Code Access
- User Administration

2.1 Portal Access - Administrator

As an Administrator, **Portal Access** is used to manage your own secured services account, in addition to managing any user(s) registered to your Agent/Group. The tasks you can perform in this section are listed below:

- Inviting new users
- Approving new users
- Approving requests for access or services
- Updating user profile

Log in and click **Portal Access** to begin a task.

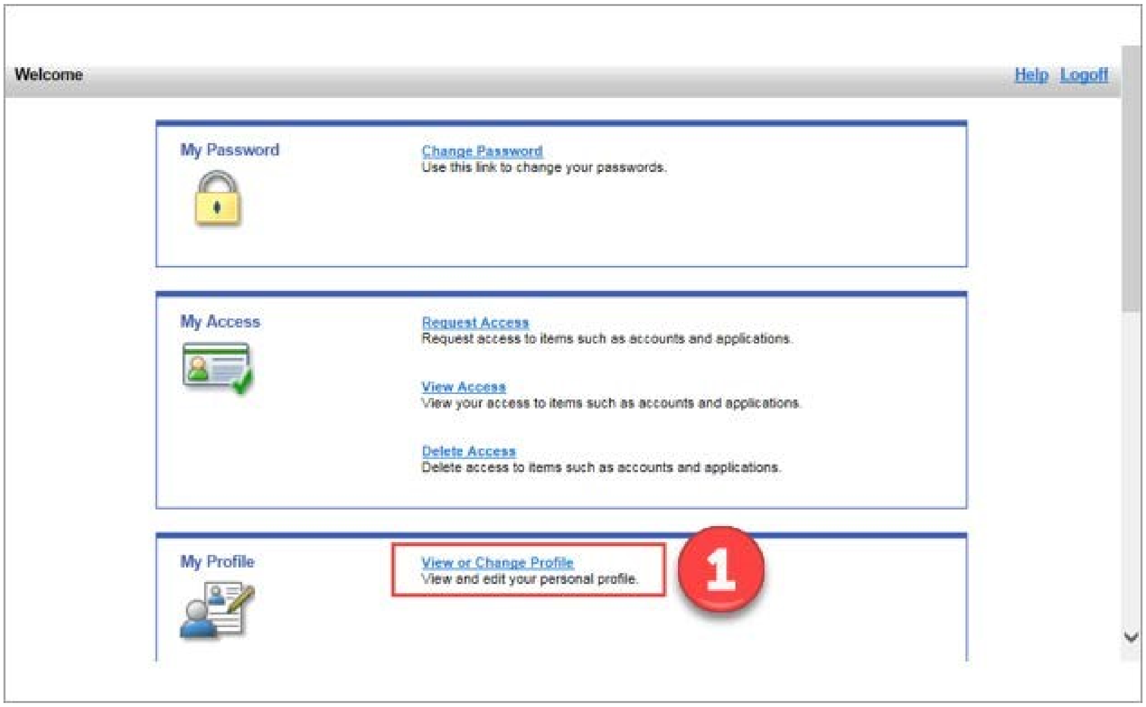
Task 4 **Inviting New Users**

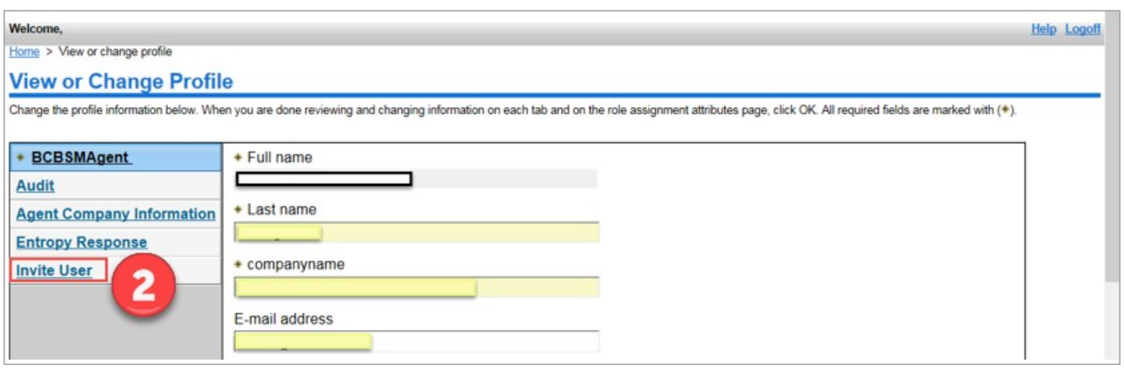
As an Administrator, you can invite new users to register via email. Each invited user receives an email invitation that provides instructions and a link to complete their registration.

- **Note:** This task assumes you are successfully logged in and have selected **Portal Access**. All fields marked with an asterisk (*) are required.

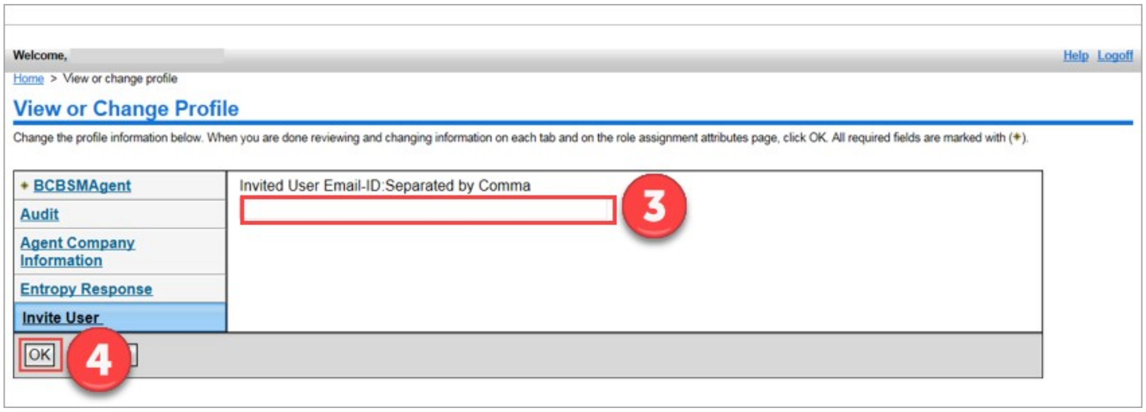
Complete the following steps to invite new users.

Step	Action

<table>
<tr>
<td>1</td>
<td>Click View or Change Profile.


</td>
</tr>
<tr>
<td>2</td>
<td>Click Invite User.


</td>
</tr>
<tr>
<td>3</td>
<td>Key the email address.
Note: If you are typing more than one email, separate each of them with a comma.</td>
</tr>
</table>

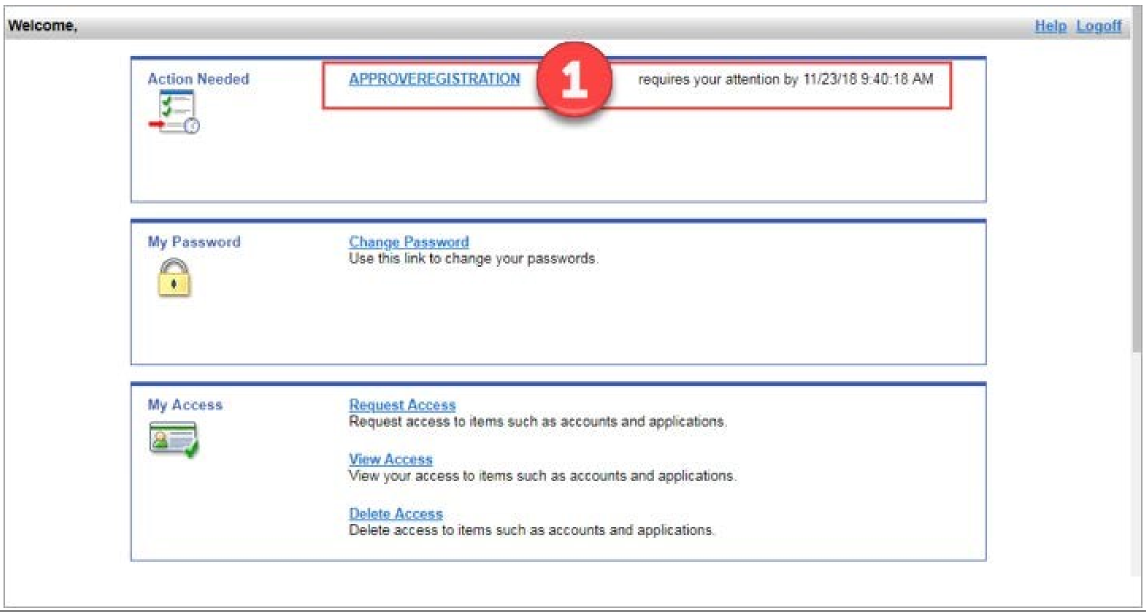
	Welcome, Help Logoff Home > View or change profile View or Change Profile Change the profile information below. When you are done reviewing and changing information on each tab and on the role assignment attributes page, click OK. All required fields are marked with (*). * BCBSMAgent Audit Agent Company Information Entropy Response Invite User Invited User Email-ID:Separated by Comma 3 OK 4
4	Click **OK**.

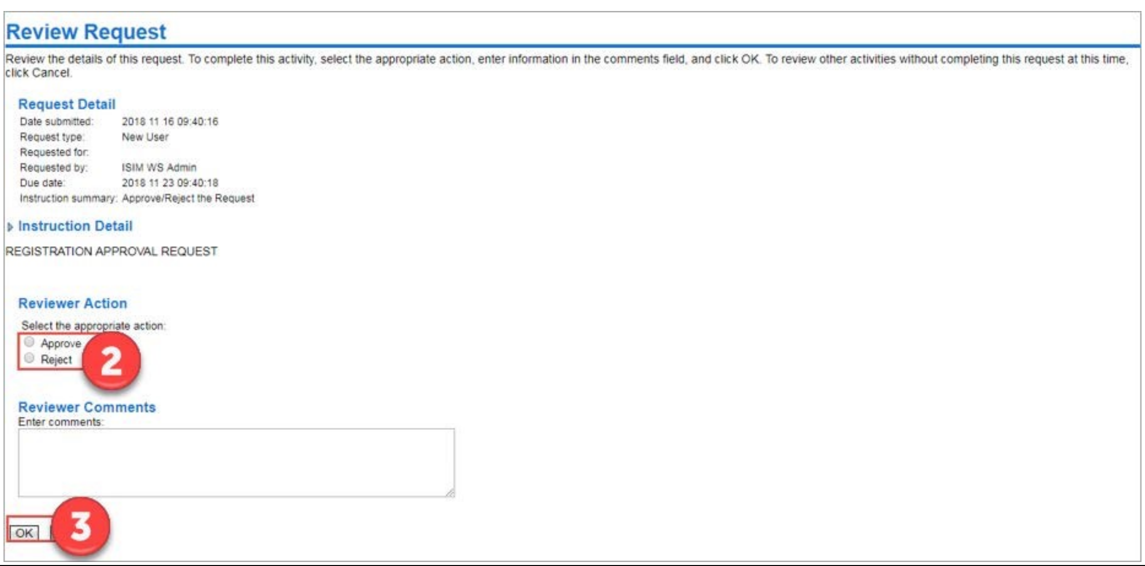
Task 5 **Approving New Users**

After a new user has completed the registration process, you are notified via email. You are then able to approve the user.

- **Note:** This task assumes you are successfully logged in and have selected **Portal Access**. All fields marked with an asterisk (*) are required.

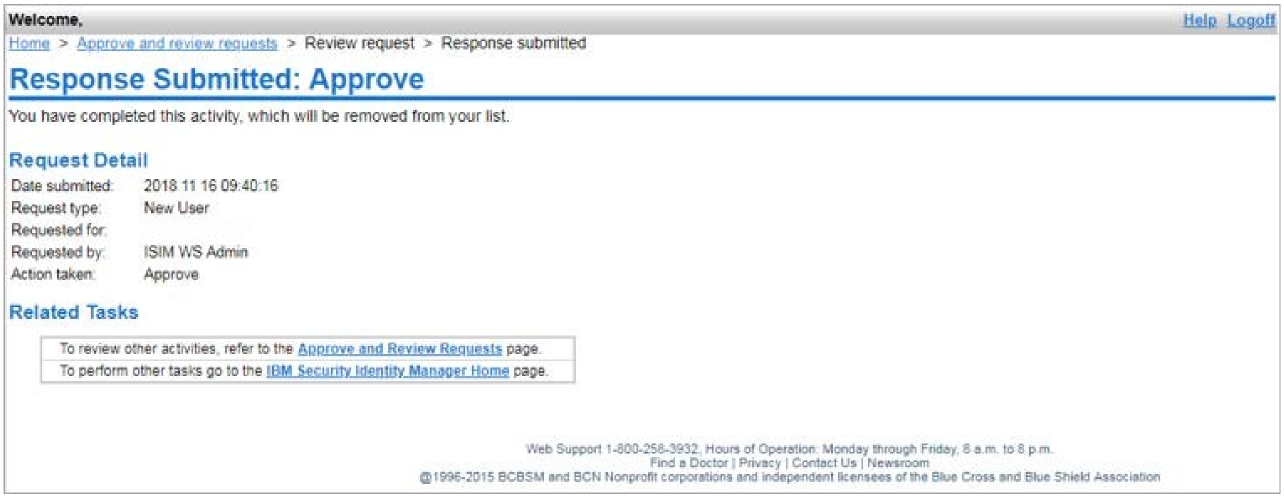
Complete the following steps to approve a new user.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click APPROVEREGISTRATION.


</td></tr>
<tr><td>2</td><td>Under Reviewer Action, Click Approve.


</td></tr>
<tr><td>3</td><td>Click OK.</td></tr>
</table>

The following screen displays to confirm your approval of the new user.

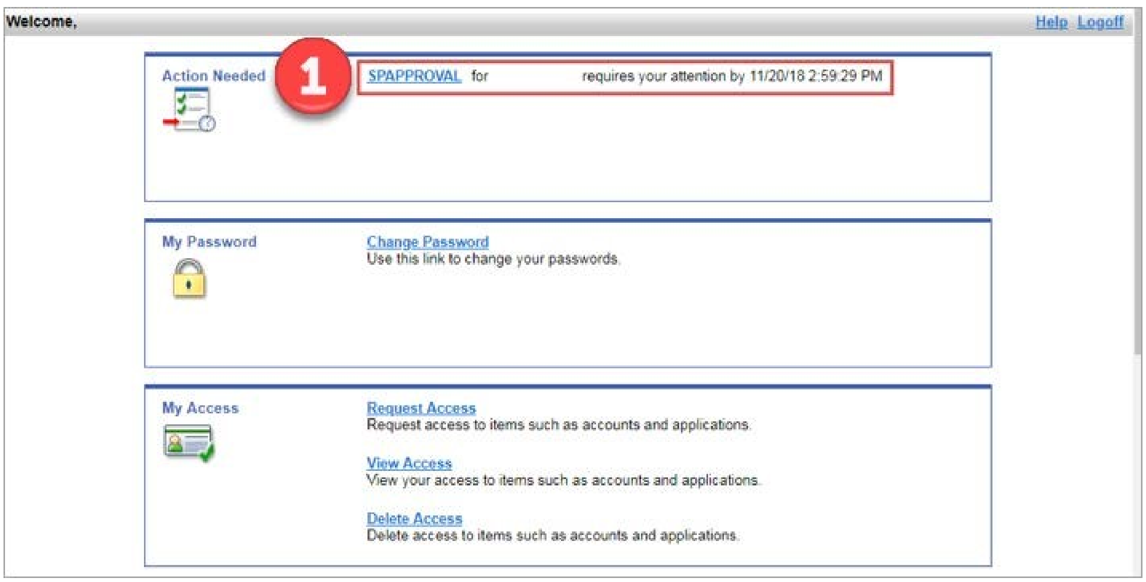
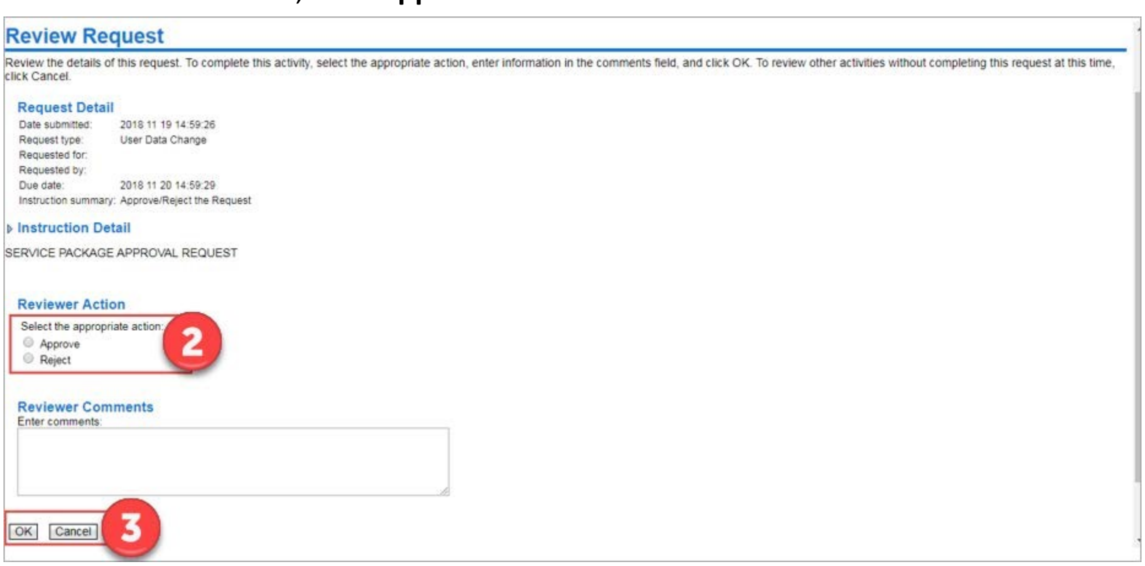


Task 6 **Approving an Access (Service) Request**

A user request for access (service) for an application does not become effective until you as an administrator approve it.

- **Note:** This task assumes you are successfully logged in and have selected **Portal Access**. All fields marked with an asterisk (*) are required.

Complete the following steps to approve an access (service) request.

Step	Action
1	Click **SPAPPROVAL**. 
2	Under Reviewer Action, Click **Approve**. 

3	Click **OK**.

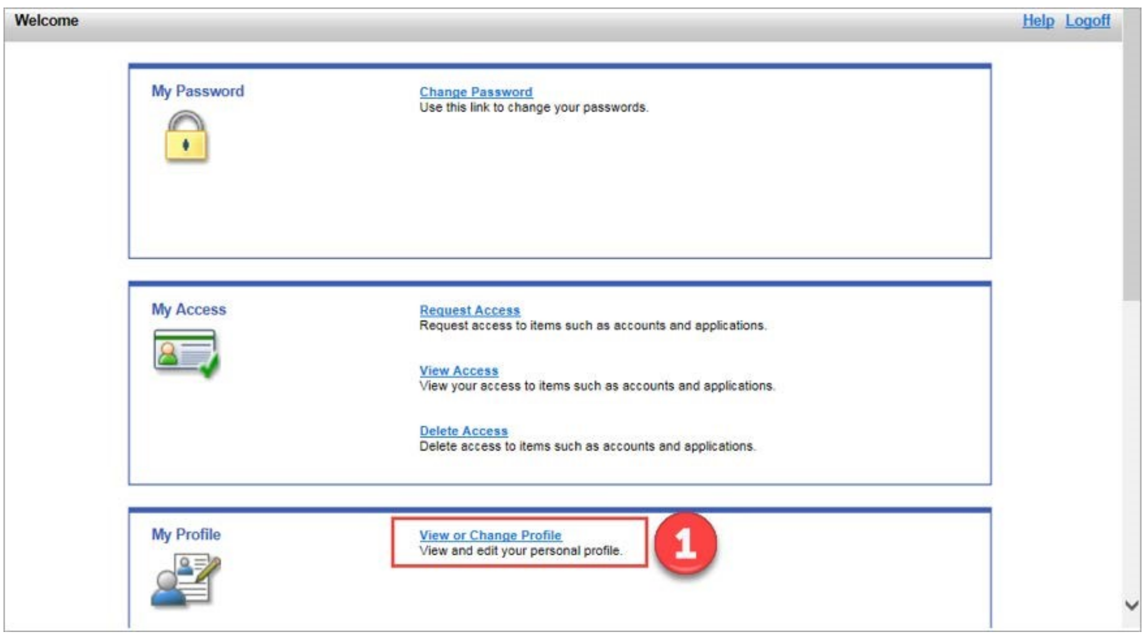
The following screen displays to confirm approval of the access (service) request.

Task 7 **Updating User Profile**

You can update your user profile from the link **View or Change Profile**, found in the My Profile section. There are five tabs on the left navigation window that make up the personal user profile. They are: BCBSM Agent (or BCBSM Group), Agent Company Information (or Group Company Information), Audit, Entropy Responses, and Invite User.

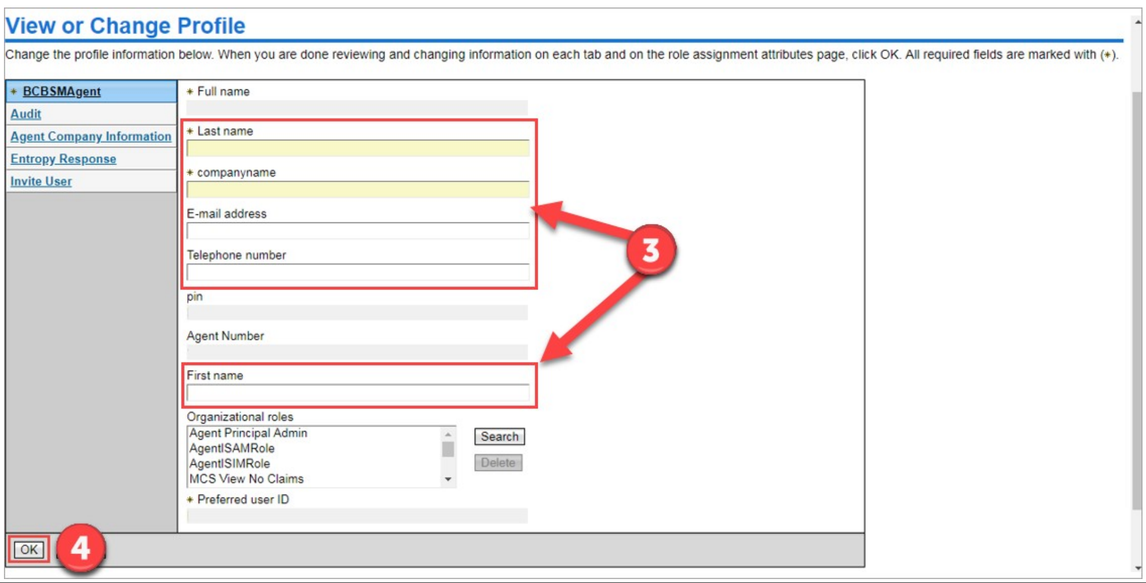
- **Note:** This task assumes you are successfully logged in and have selected **Portal Access**. All fields marked with an asterisk (*) are required.

Complete the following steps to update a user profile.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click View or Change Profile.

</td></tr>
<tr><td>2</td><td>You can update information under any of the tabs in the left navigation pane by clicking on the appropriate tab.

Note: The appearance of the Agent and Group screens are similar. Although the fields and information on the respective screens are unique, the process of updating the fields is the same.

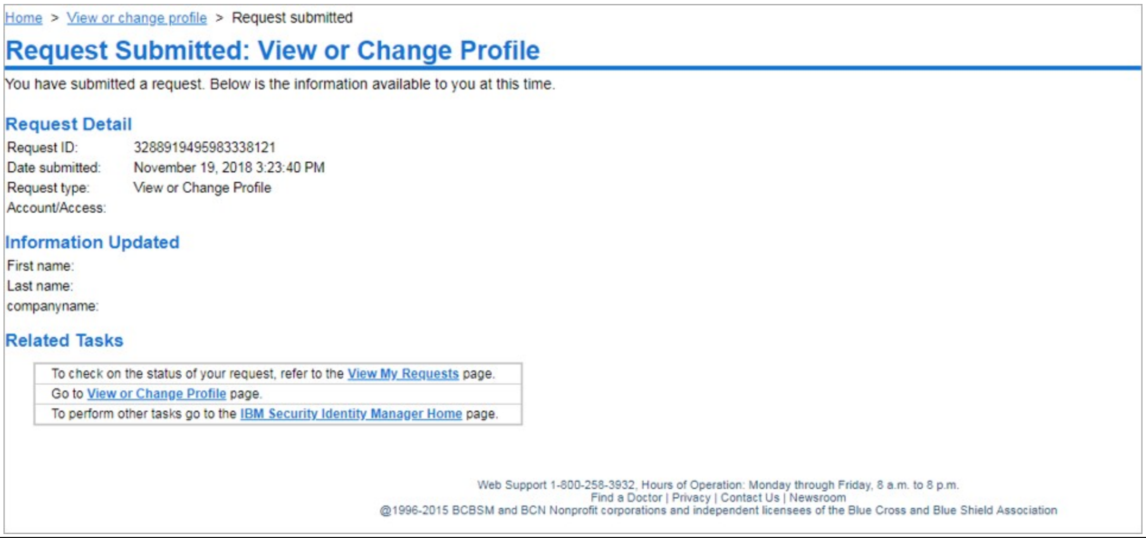
<table>
<tr><th>IF you want to update:</th><th>THEN:</th></tr>
<tr><td>BCBSM Agent (or Group) tab</td><td>Go to step 3.</td></tr>
</table></td></tr>
</table>

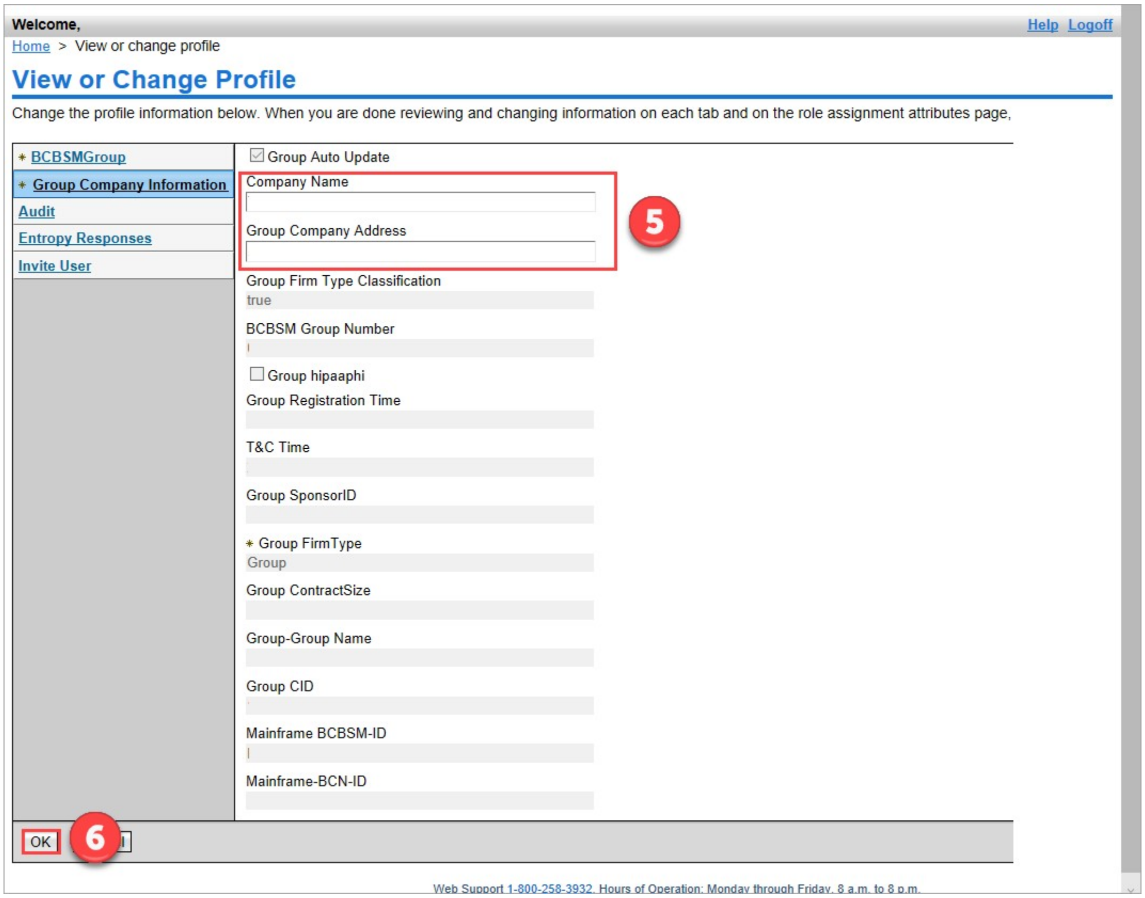
	Agent (or Group) Company Information tab	Go to step 5.
	Entropy Responses **Note:** Entropy Responses refers to security questions and answers.	Go to step 7.
	Invite User	Go to step 9.
3	Key the updated information in the correct fields. **Note:** The screen displayed is for an Agent user. The screen for a Group user is similar, but with fields and information relating to the Group. The process of updating is the same. 	

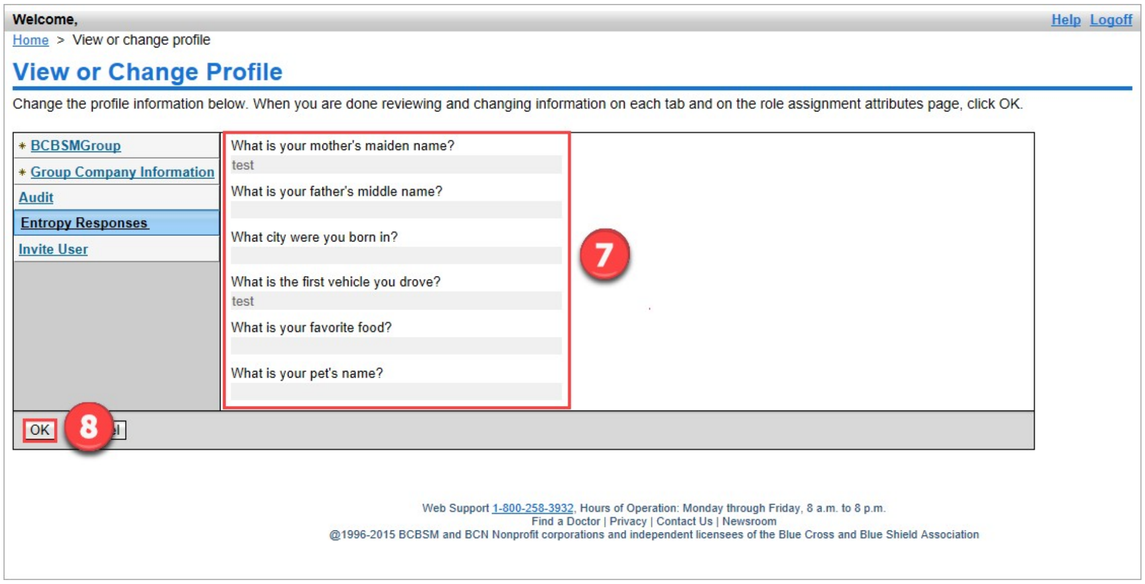
4

Click **OK**.

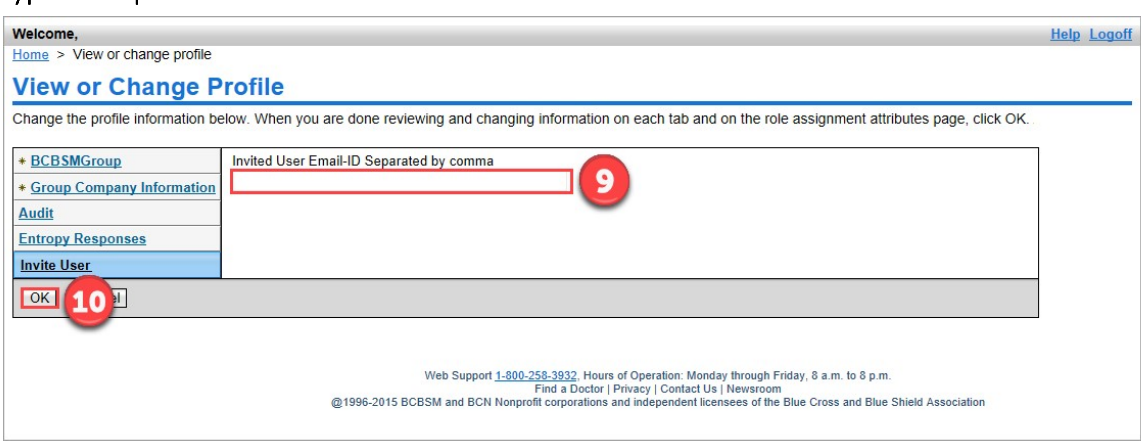
Note: The following screen displays to confirm the profile change request has been submitted.



5	Key the updated information in the correct fields. **Note:** The screen displayed is for Group Company Information. The screen for Agent Company Information is similar, but with fields and information relating to the Agent. The process of updating is the same. 
6	Click **OK**. **Note:** A screen displays to confirm the profile change request has been submitted.
7	Key the updated information in the correct fields. **Note:** Entropy Responses refers to security questions and answers.

<table>
<tr><td></td><td>


</td></tr>
<tr><td>8</td><td>
Click OK.
Note: A screen displays to confirm the profile change request has been submitted.

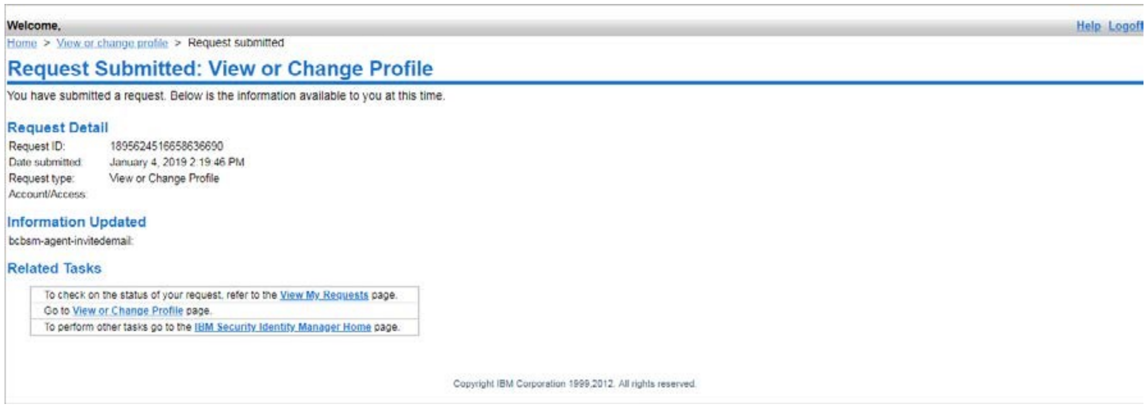

</td></tr>
<tr><td>9</td><td>
Type the updated information in the correct fields.


</td></tr>
</table>

<table>
<tr>
<td>10</td>
<td>

Click **OK**.

Note: A screen displays confirming the profile change request has been submitted.



</td>
</tr>
</table>

2.2 Group Code Access - Administrator

As an Administrator, the **Group Code Access** link at the top of the landing page is used to manage your users' access (e.g., manage group/divisions, external access, automatic-updates). The tasks you can perform in this section are listed below:

- Adding/removing group codes
- Requesting/approving external access
- Turning on/off automatic-updates

Log in and click **Group Code Access** to begin a task.

Task 8 **Adding/Removing Group Codes**

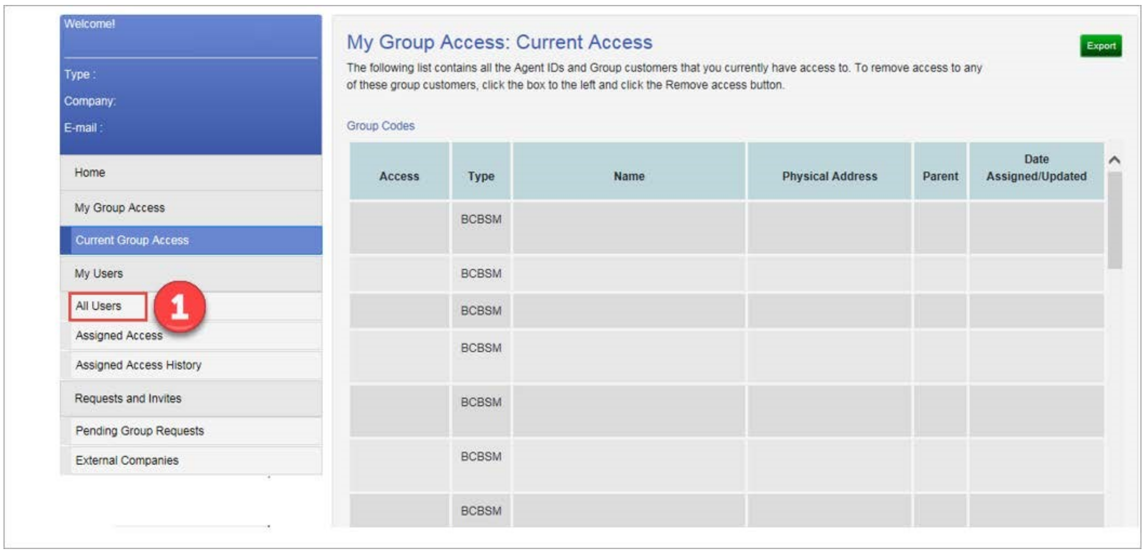
As an Administrator, you can add and/or remove group codes for a user.

- **Note:** If you turn on the Automatic-Updates you will be granting access to all Group Codes. Automatic-Updates must be turned **Off** to remove Group Codes.
- This task assumes you are successfully logged in and have selected **Group Code Access**. All fields marked with an asterisk (*) are required.

Complete the following steps to add/remove group codes.

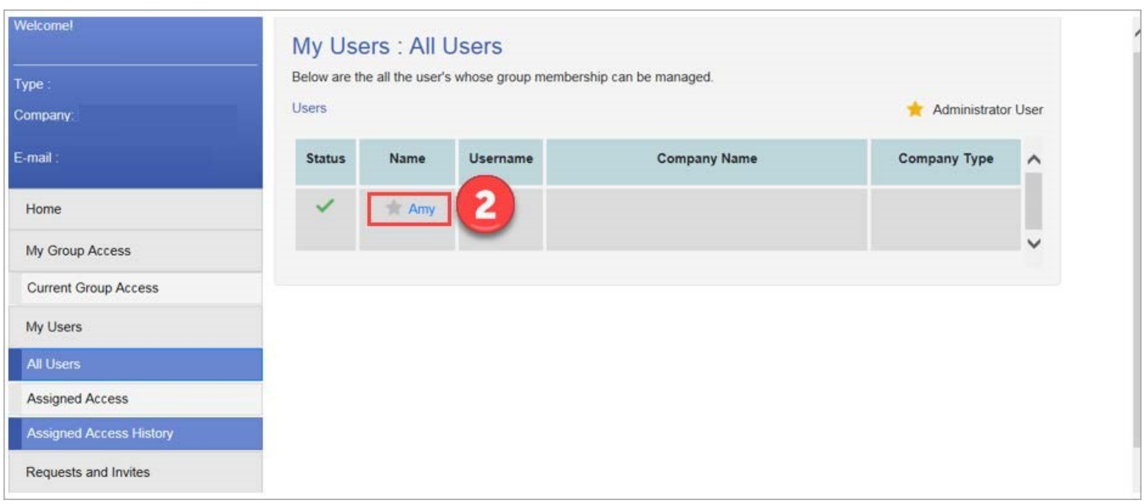
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>

Click **All Users**.



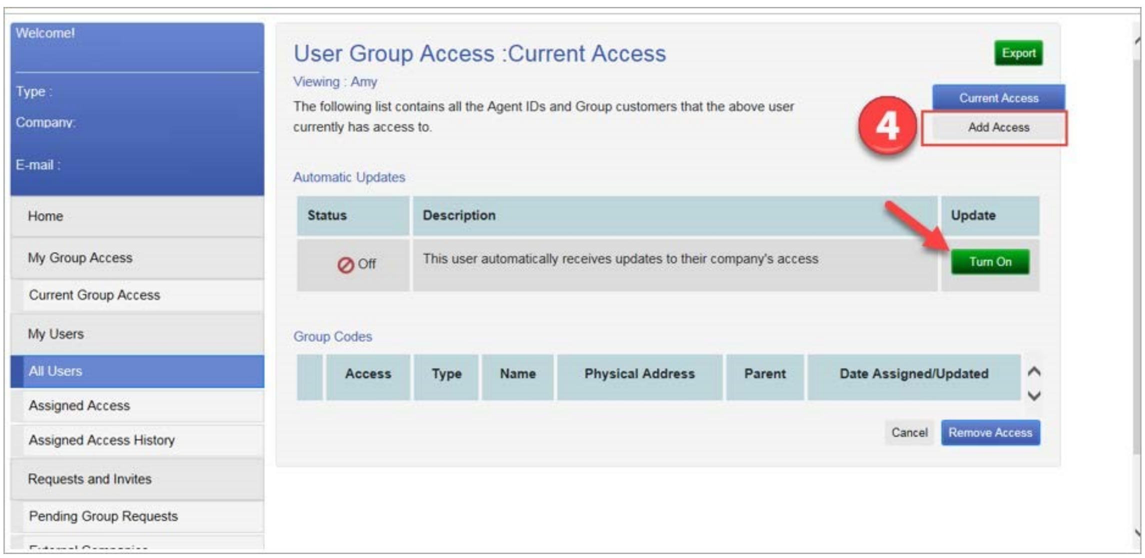
</td></tr>
<tr><td>2</td><td>

Click user's **Name**.

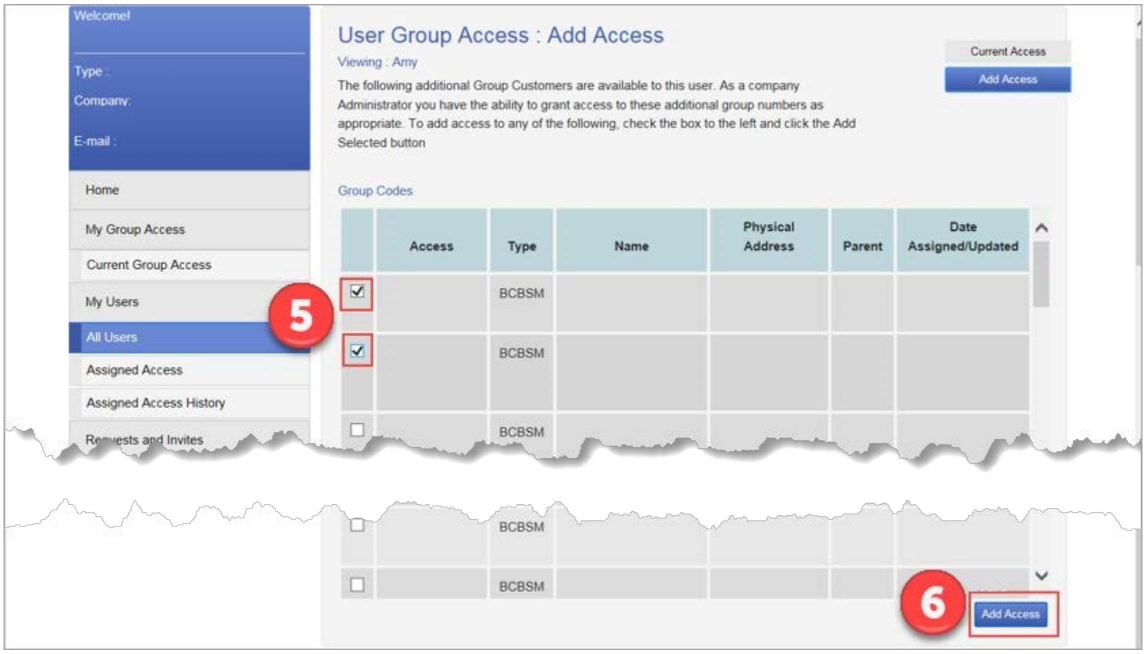
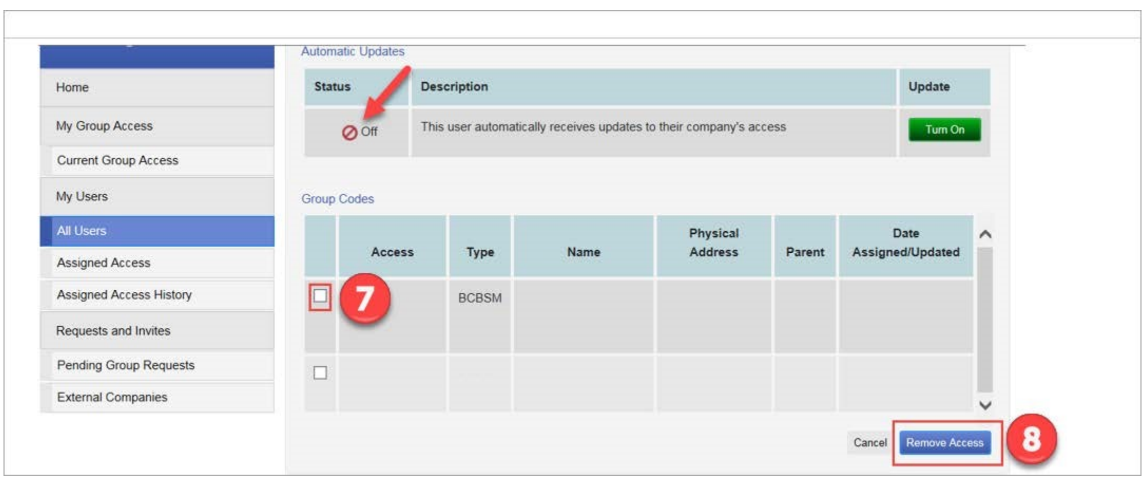


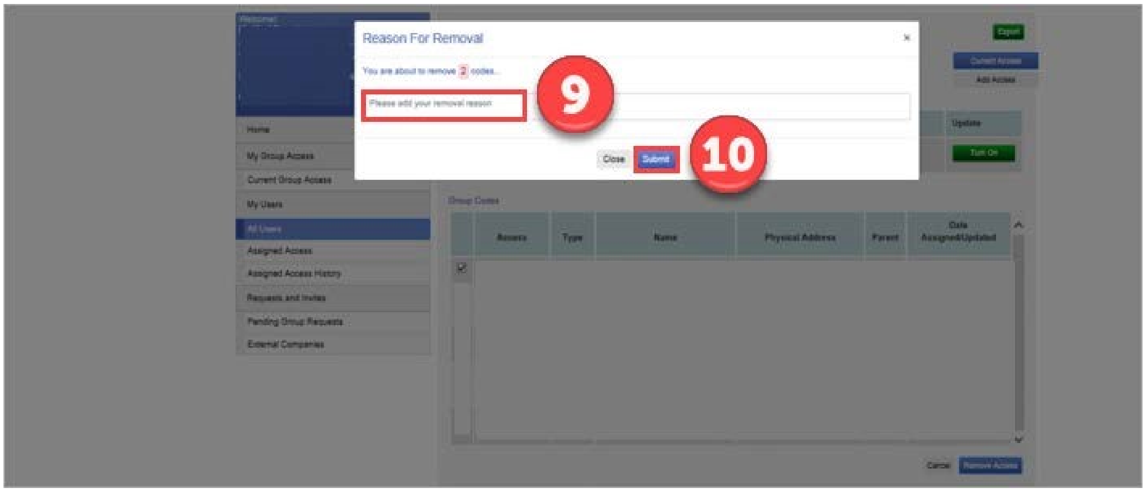
</td></tr>
</table>

<table>
<tr><td>3</td><td>Note: The selected user’s Current Access displays.
<table>
<tr><th>To</th><th>Then</th></tr>
<tr><td>Add Group Codes</td><td>Go to step 4.</td></tr>
<tr><td>Remove Group Codes</td><td>Go to step 7.</td></tr>
</table>
</td></tr>
<tr><td>4</td><td>Click Add Access.

Note: If Turn On is selected for Automatic-Updates, access is granted to all Group Codes.


</td></tr>
</table>

5	Click the checkbox(es) next to the group code(s) you want the user to access. 
6	From the Current Access screen, click **Add Access**.
7	Click the checkbox(es) next to the group code(s) to remove. **Note:** Automatic-Updates must be **Off** to remove Group Codes. 
8	Click **Remove Access**.

9	Type a reason for removal. **Note:** This is optional. 
10	Click **Submit**. **Note:** The codes are now removed.

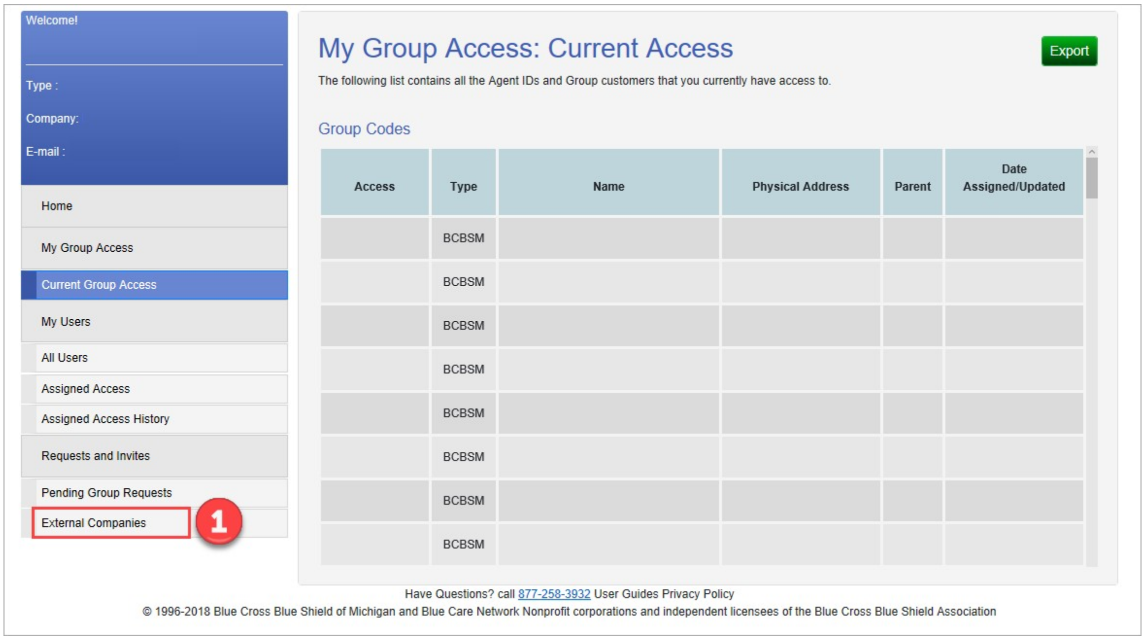
Task 9 **Requesting/Approving External Access**

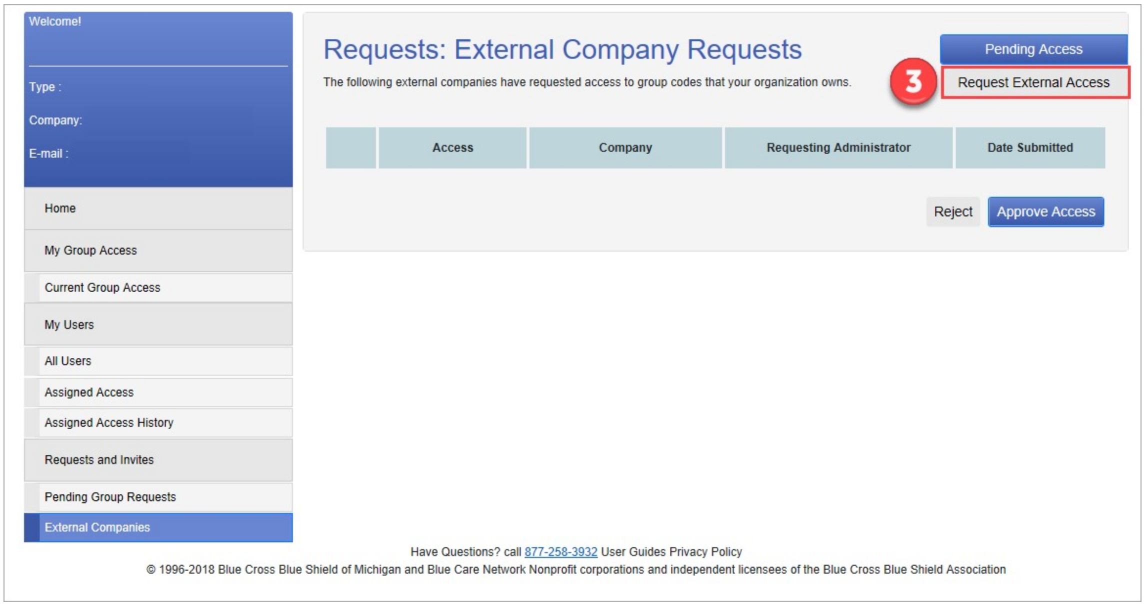
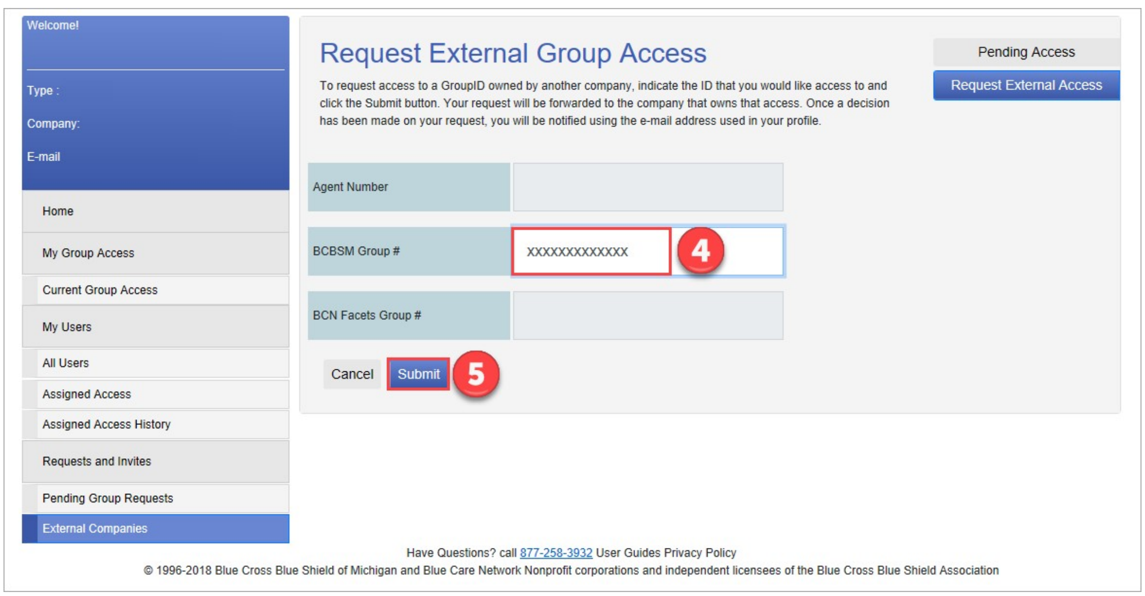
Administrators can request access to group numbers owned by other external companies. They can also approve external requests. When a request is submitted, the administrator(s) in the owning Group company is notified. The administrator(s) of the owning Group company can decide to approve or to reject requests from outside Group companies.

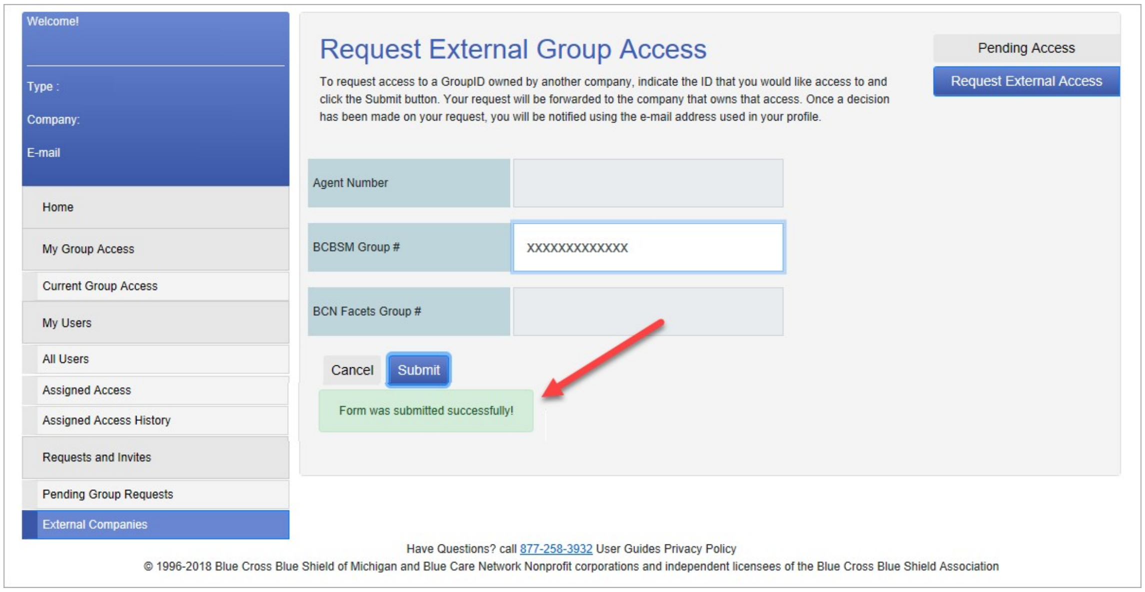
- **Note:** This task assumes you are successfully logged in and have selected **Group Code Access.** All fields marked with an asterisk (*) are required.

Complete the following steps to request/approve external access.

Step	Action

<table>
<tr><td>1</td><td>Click External Companies.

</td></tr>
<tr><td>2</td><td>Note: The External Company Requests screen displays.
<table>
<tr><th>To</th><th>Then</th></tr>
<tr><td>Request External Access</td><td>Go to step 3.</td></tr>
<tr><td>Approve External Access</td><td>Go to step 6.</td></tr>
</table></td></tr>
<tr><td>3</td><td>Click Request External Access.</td></tr>
</table>

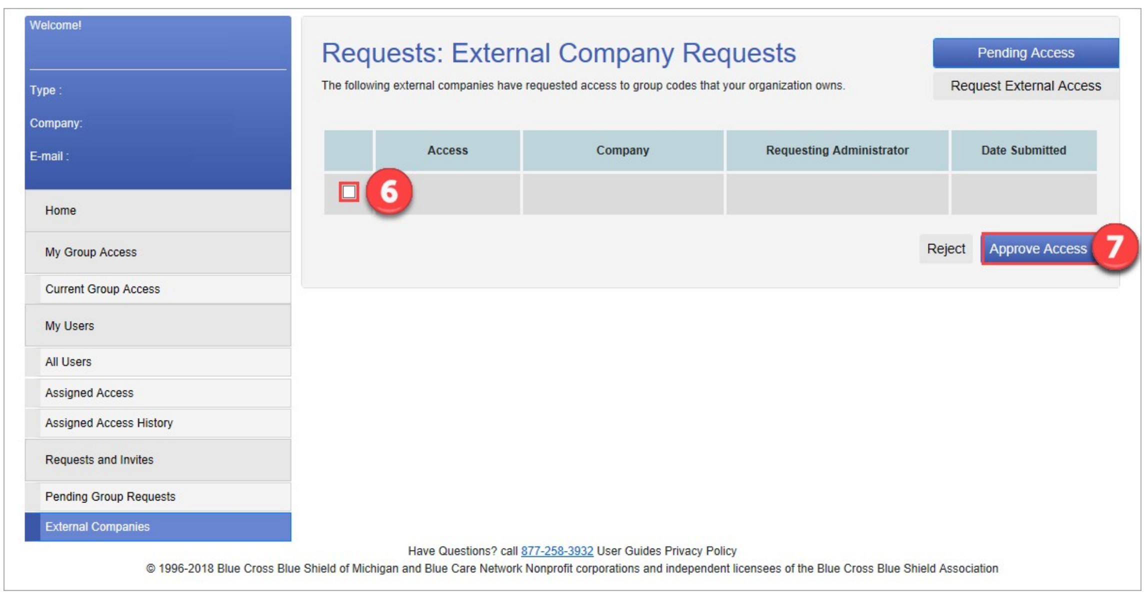
	
4	Key the information in the correct field. **Note:** The request can be submitted by populating any of the displayed fields. The information requested may vary, depending on the type of user. 
5	Click **Submit**. **Note:** The following screen displays to confirm the form was submitted successfully.



6

Click the checkbox(es) next to the request(s) to approve.

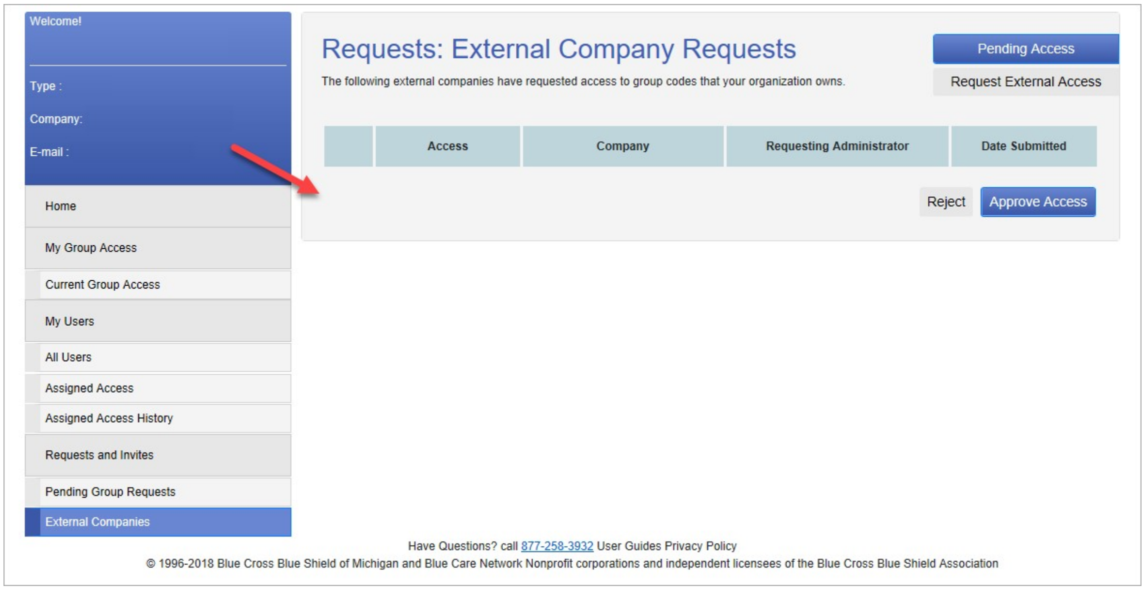
Note: Alternatively, you can also reject the request by selecting **Reject**.



7

Click **Approve Access**.

Note: The following screen displays and the request no longer appears, meaning it has been approved.


Welcome!
Type :
Company:
E-mail :
Home
My Group Access
Current Group Access
My Users
All Users
Assigned Access
Assigned Access History
Requests and Invites
Pending Group Requests
External Companies
Requests: External Company Requests
The following external companies have requested access to group codes that your organization owns.
Pending Access
Request External Access
Access
Company
Requesting Administrator
Date Submitted
Reject
Approve Access
Have Questions? call 877-258-3932 User Guides Privacy Policy
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Task 10 **Approving Group Code Requests**

A user can request access to a group code, and as the administrator you can approve or reject the request.

- **Note:** This task assumes you are successfully logged in and have selected **Group Code Access**. All fields marked with an asterisk (*) are required.

Complete the following steps to approve requested group code(s).

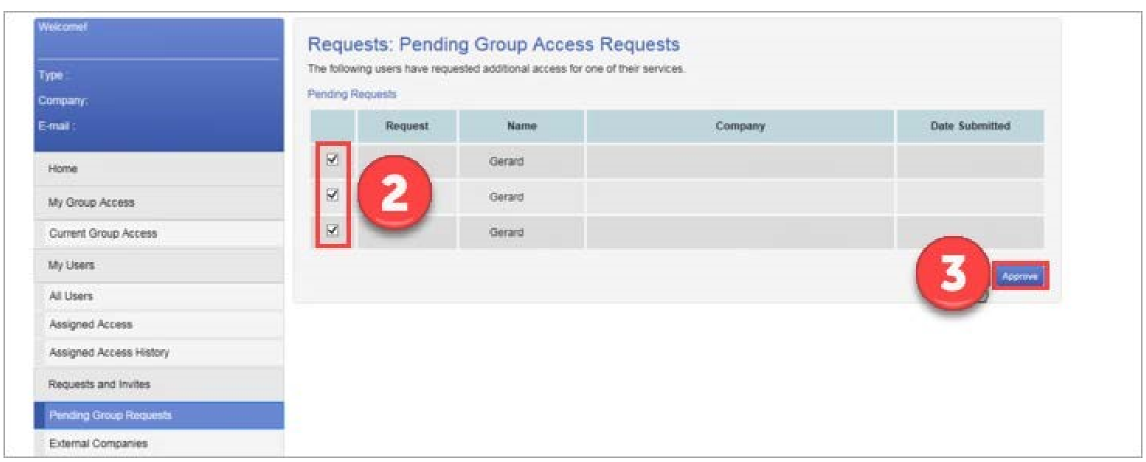
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>

Click **Pending Group Requests**.

</td></tr>
<tr><td>2</td><td>

Click the checkbox(es) next to the Pending Requests you want to approve.

Note: Alternatively, you can also reject the request by selecting **Reject**.



</td></tr>
<tr><td>3</td><td>

Click **Approve**.

</td></tr>
</table>

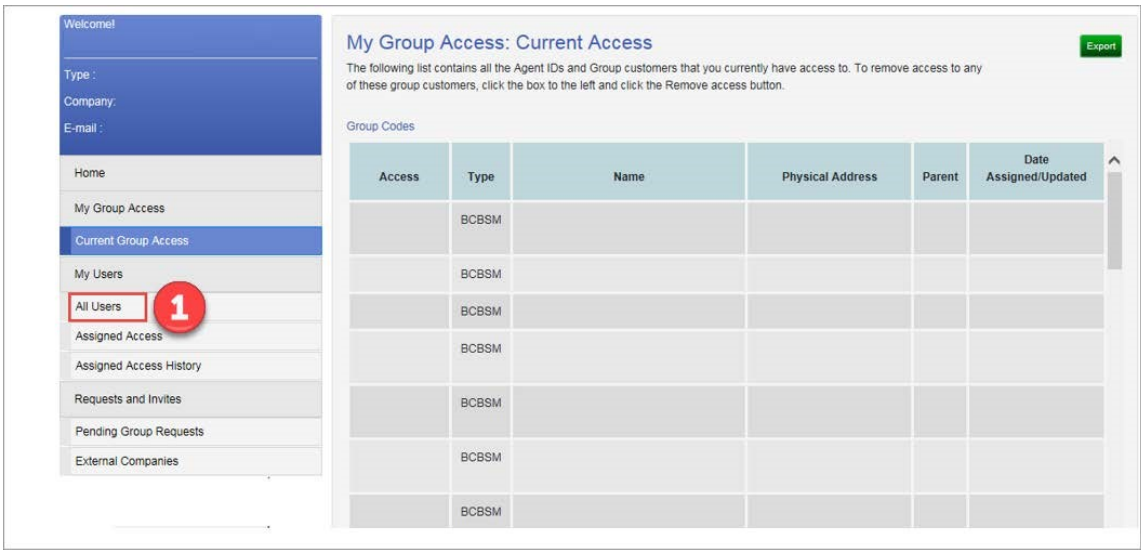
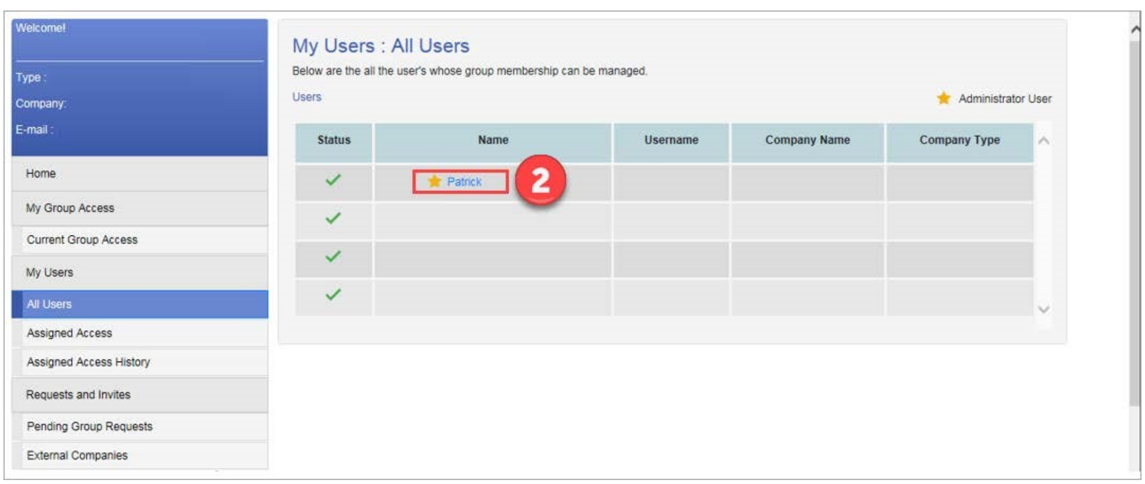
The following screen displays that the pending requests are no longer listed and have been approved.

Task 11 **Turning On/Off Automatic-Updates**

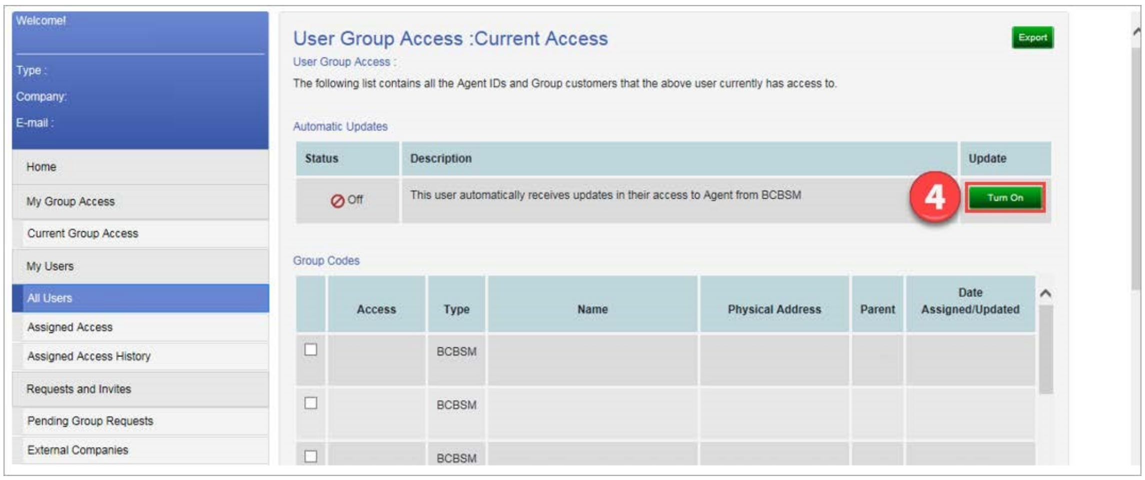
If automatic-updates are turned on for a user, the user is given access to all current group codes and they automatically receive access to newly added group codes in the future. If the automatic-updates are turned off, the group code access must be added manually for the user.

- **Note:** This task assumes you are successfully logged in and have selected **Group Code Access**. All fields marked with an asterisk (*) are required.

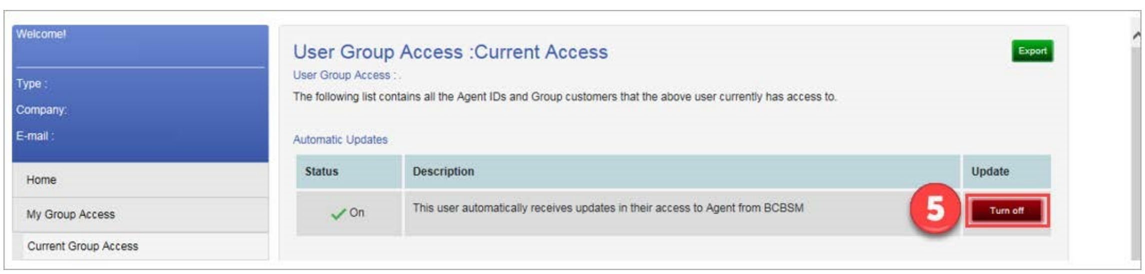
Complete the following steps to turn on/off a user's automatic-updates.

Step	Action
1	Click **All Users**. 
2	Click the user's **Name**. **Note:** A star next to the user's name indicates they are an Administrator. 

<table>
<tr><td>3</td><td>Note: If a user’s automatic-updates are currently off, you can turn them on. Also, if a user’s automatic-updates are currently on, you can turn them off.
<table>
<tr><th>To</th><th>Then</th></tr>
<tr><td>Turn on Automatic-Updates</td><td>Go to step 4.</td></tr>
<tr><td>Turn off Automatic-Updates</td><td>Go to step 5.</td></tr>
</table>
</td></tr>
<tr><td>4</td><td>Click Turn On.



</td></tr>
<tr><td>5</td><td>Click Turn Off.



</td></tr>
</table>

2.3 User Administration - Administrator

As an administrator, you have access to the User Administration link at the top of the landing page. It is used to manage your group users’ profiles (e.g., manage user access/services, change passwords). The tasks you can perform in this section are listed below:

- Resetting user password
- Locking/unlocking user

- Terminating user
- Adding/removing services from user
- Assigning an administrator

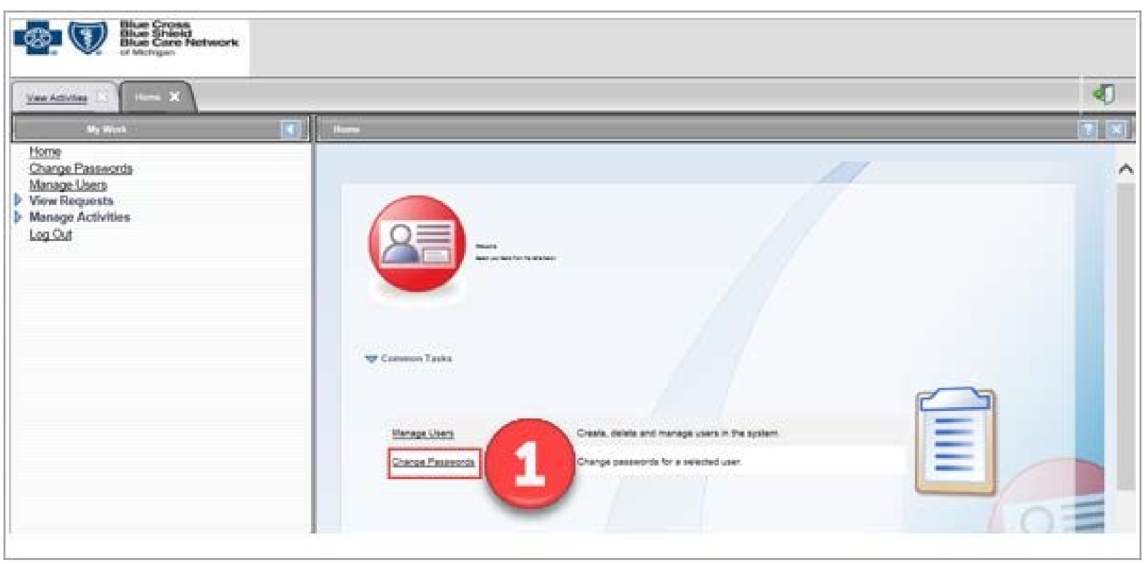
Log in and click **User Administration** to begin a task.

Task 12 **Changing/Resetting User Passwords**

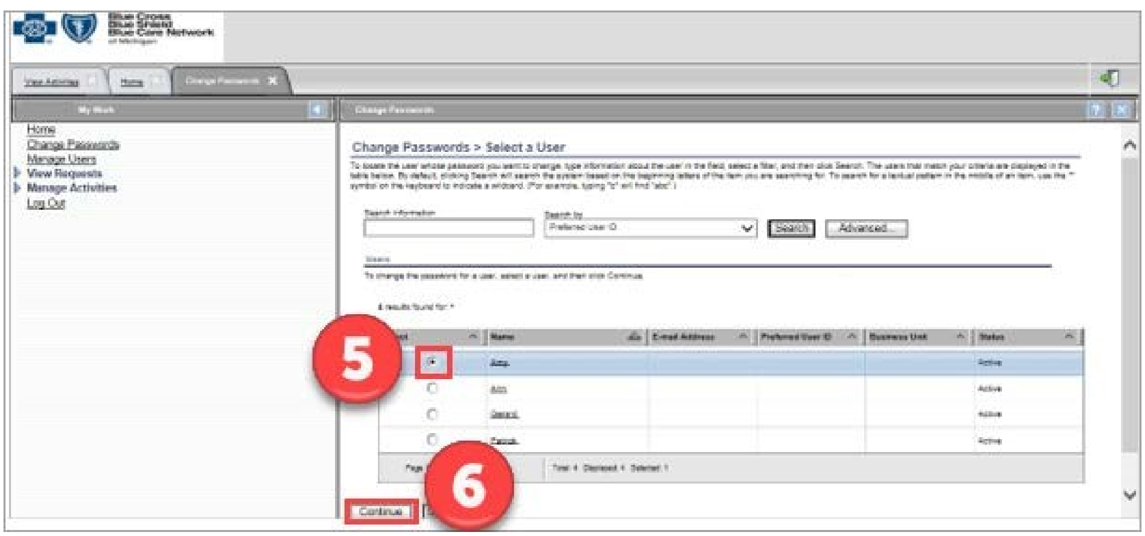
If a user keys in an incorrect password three times or more, the system security will automatically disable their account. At that point, you need to change or reset a user password.

- **Note:** This task assumes you are successfully logged in and have selected **User Administration**. All fields marked with an asterisk (*) are required.

Complete the following steps to change a user password.

Step	Action
1	Click the **Change Passwords** link. 

2	Type the user's information in the **Search** field. **Note:** The information required in the search depends on the filter selected in the **Search by** field. You can search by Preferred User ID, Full name, Email address, or Last name. 
3	Click **Search by** drop-down arrow to select the proper filter.

4	Click **Search**. **Note:** Any users matching the search criteria you selected are displayed.
5	Click the radio button next to the user whose password you want to change. 
6	Click **Continue**.

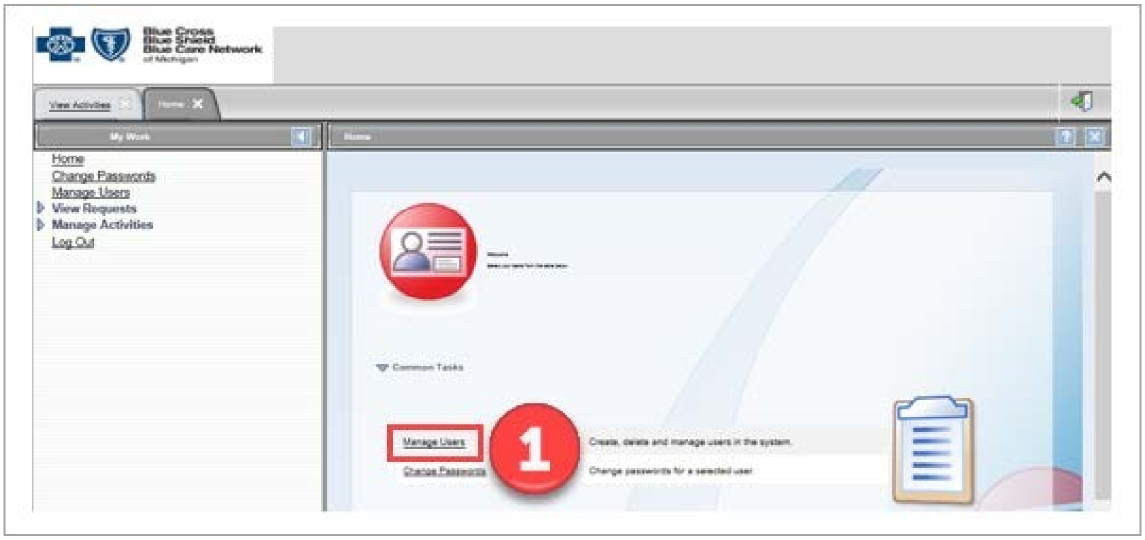
7	Type the same new password in the in the **Password** and **Confirm Password** fields. 
8	Click **Submit**.
9	Click **Close**. **Note:** The home screen of User Administration is displayed.
	

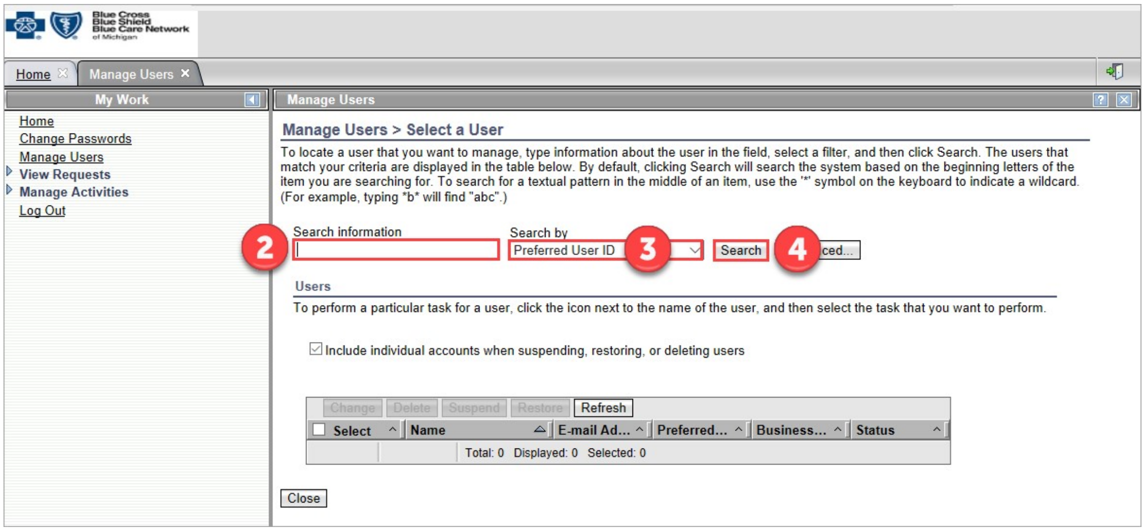
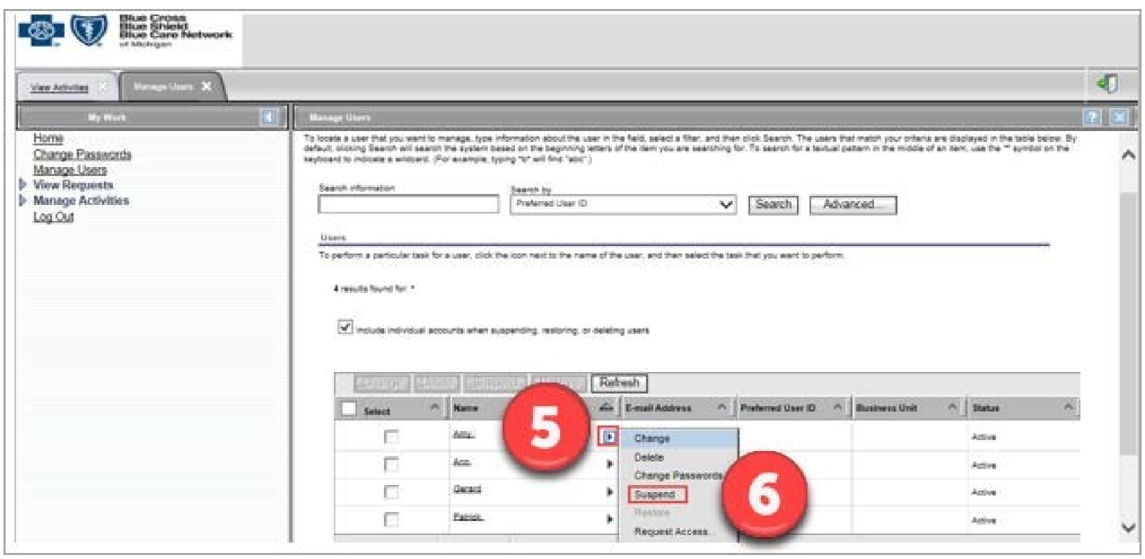
Task 13 **Suspending/Locking a User Account**

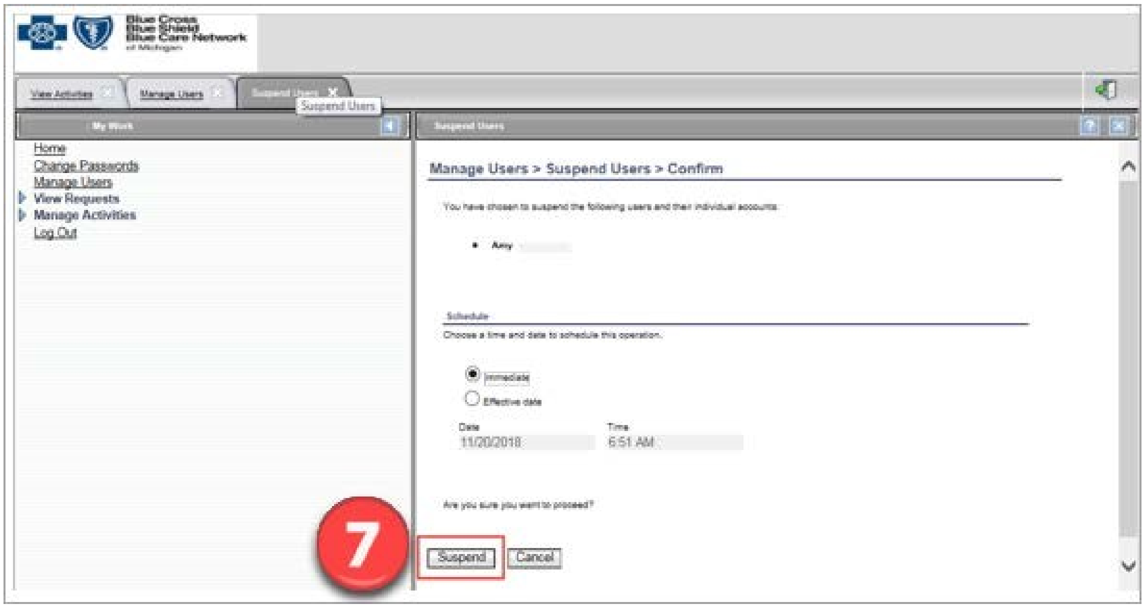
Occasionally it may become necessary to suspend (lock) a user account, for example, if they are out on leave or have been terminated. In this system, the user no longer needs to be suspended before being terminated.

- **Note:** This task assumes you are successfully logged in and have selected **User Administration**. All fields marked with an asterisk (*) are required.

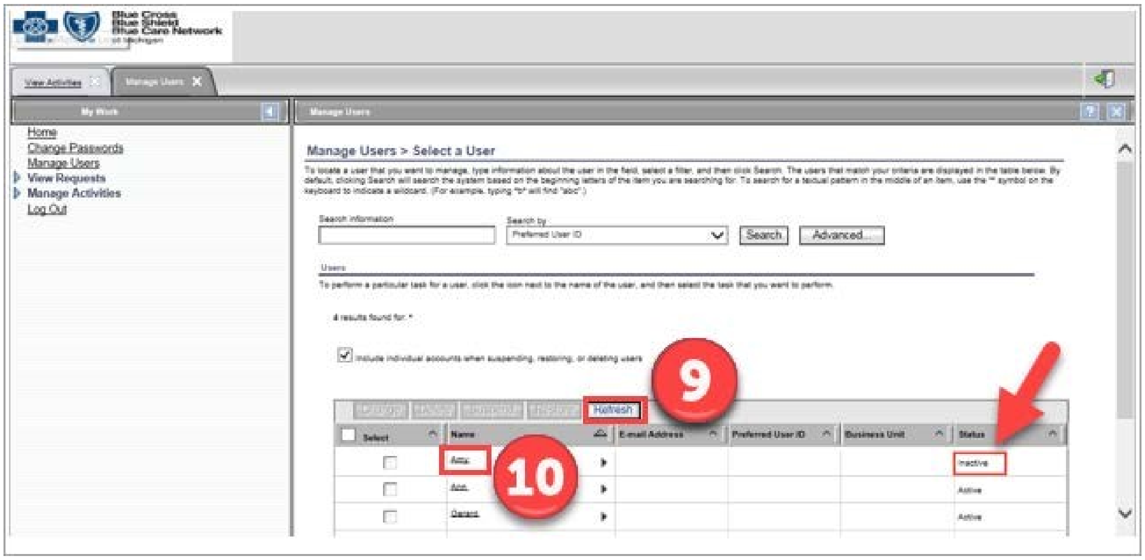
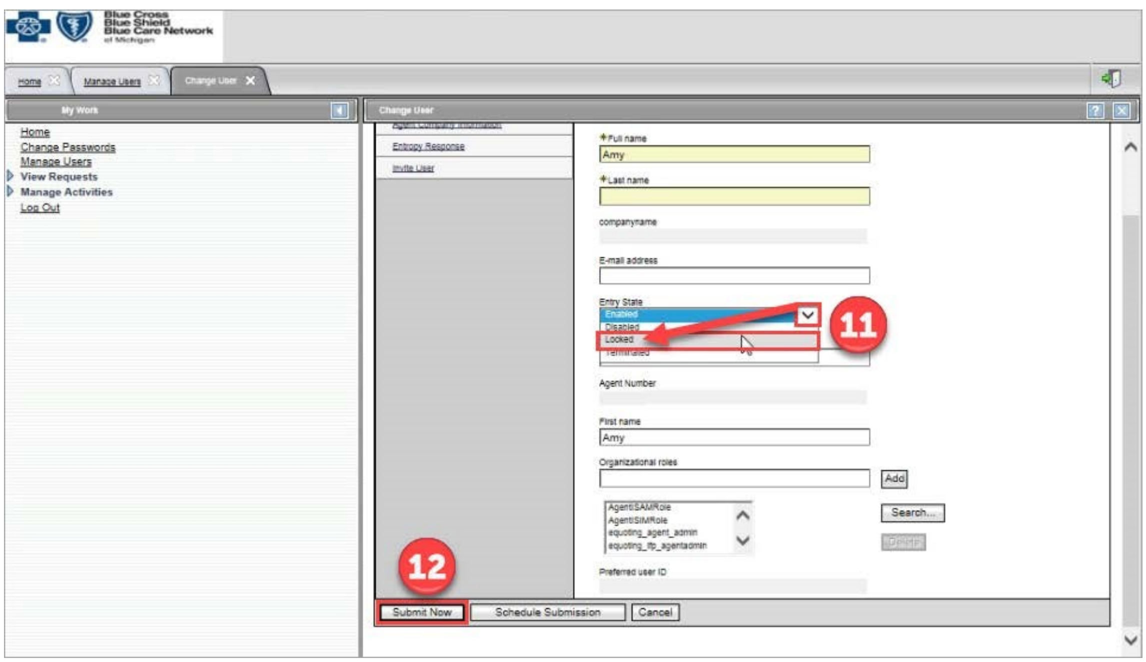
Complete the following steps to suspend a user's account.

Step	Action
1	Click **Manage Users**. 
2	Type the user's information in the **Search** field. **Note:** The information required in the search depends on the filter selected in the **Search by** field. You can search by Preferred User ID, Full name, Email address, or Last name.

	
3	Click **Search by** drop-down arrow to select the proper filter.
4	Click **Search**. **Note:** Any users matching the search criteria you selected are displayed.
5	Click the drop-down arrow to display the popup menu. 
6	Click **Suspend**.
7	Click **Suspend** to confirm.

<table>
<tr><td></td><td>
</td></tr>
<tr><td>8</td><td>Click Close.
Note: This closes the Suspend Users tab and returns to Manage Users tab.

</td></tr>
<tr><td>9</td><td>Click Refresh.
Note: The user status displays Inactive.</td></tr>
</table>

	
10	Click the name of the appropriate user.
11	Click the Entry State drop-down arrow and select **Locked**. 
12	Click **Submit Now**.

Task 14 **Restoring/Activating a Suspended/Locked Account**

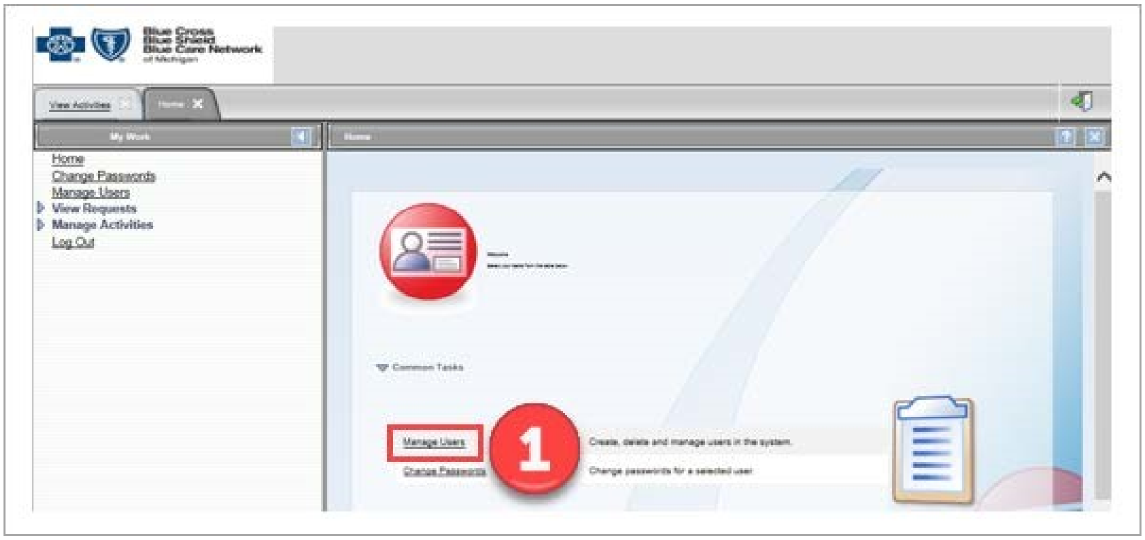
It may be necessary to restore (activate) a user account, for example, if the user was out on leave.

- **Note:** This task assumes you are successfully logged in and have selected **User Administration**. All fields marked with an asterisk (*) are required.

Complete the following steps to restore a user account.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>

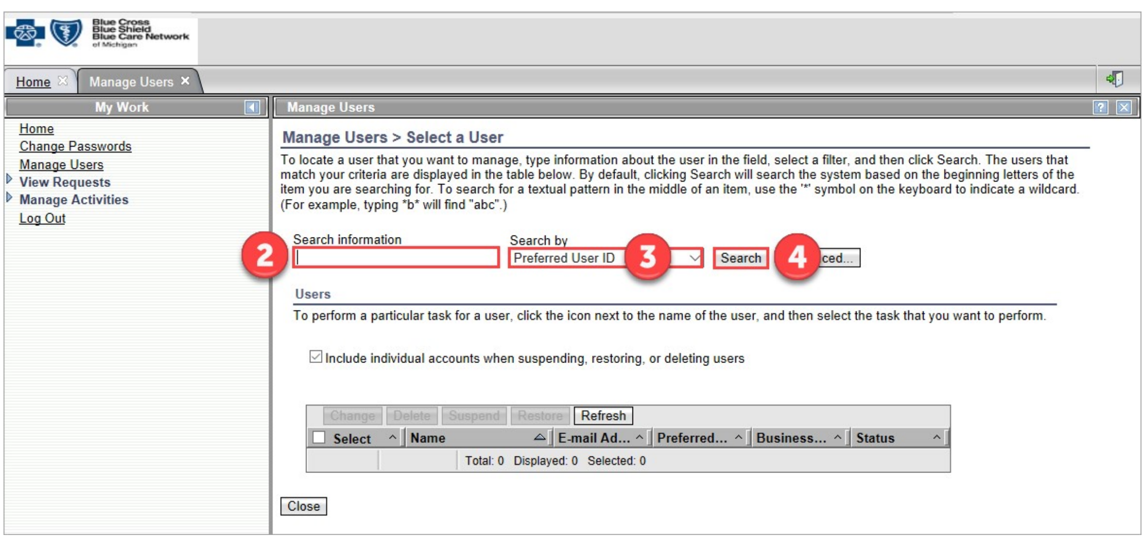
Click the **Manage Users** link.



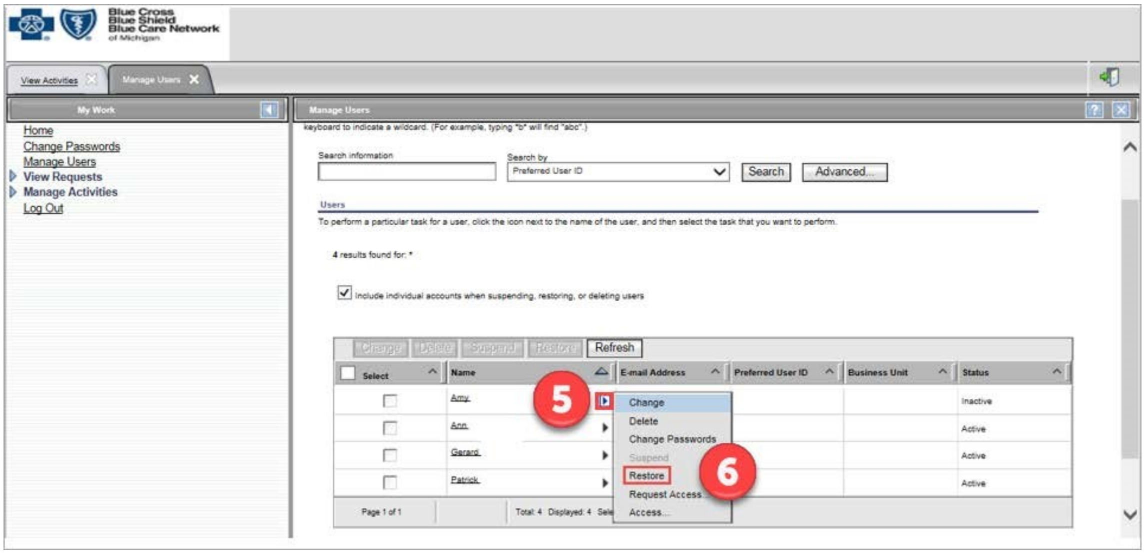
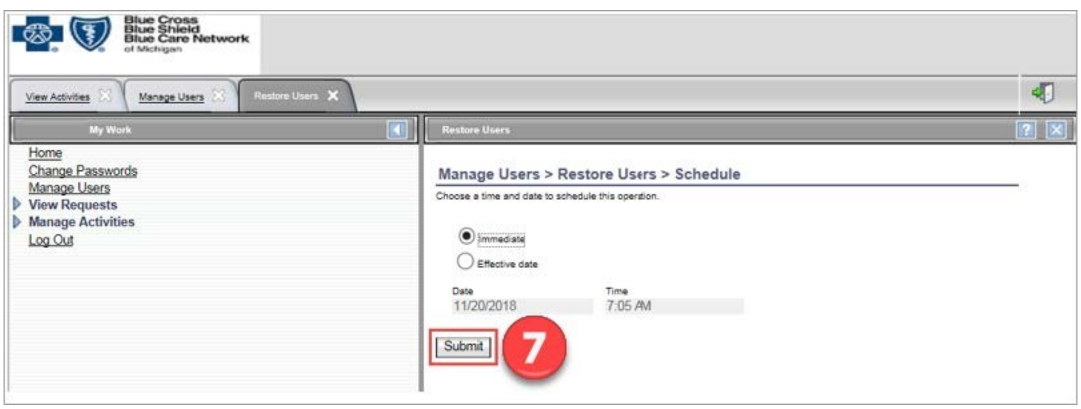
</td></tr>
<tr><td>2</td><td>

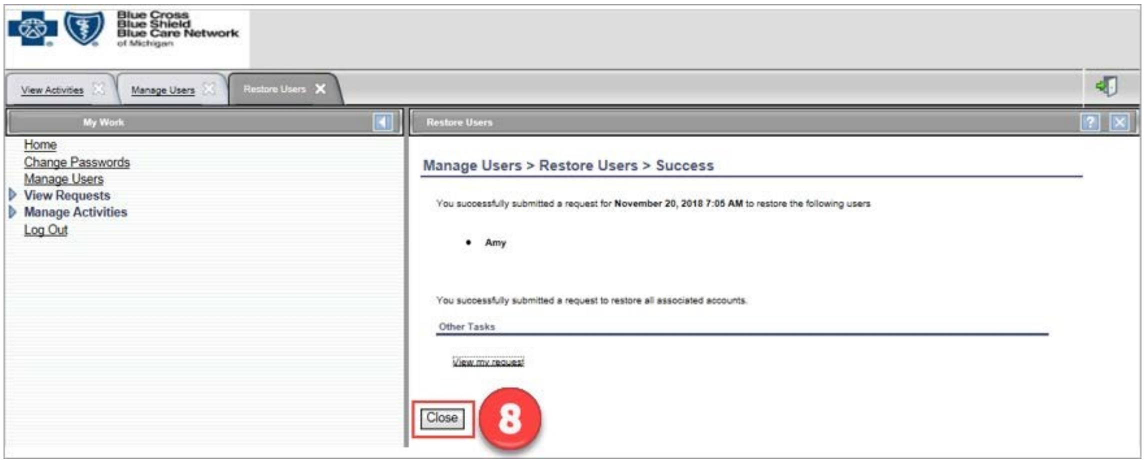
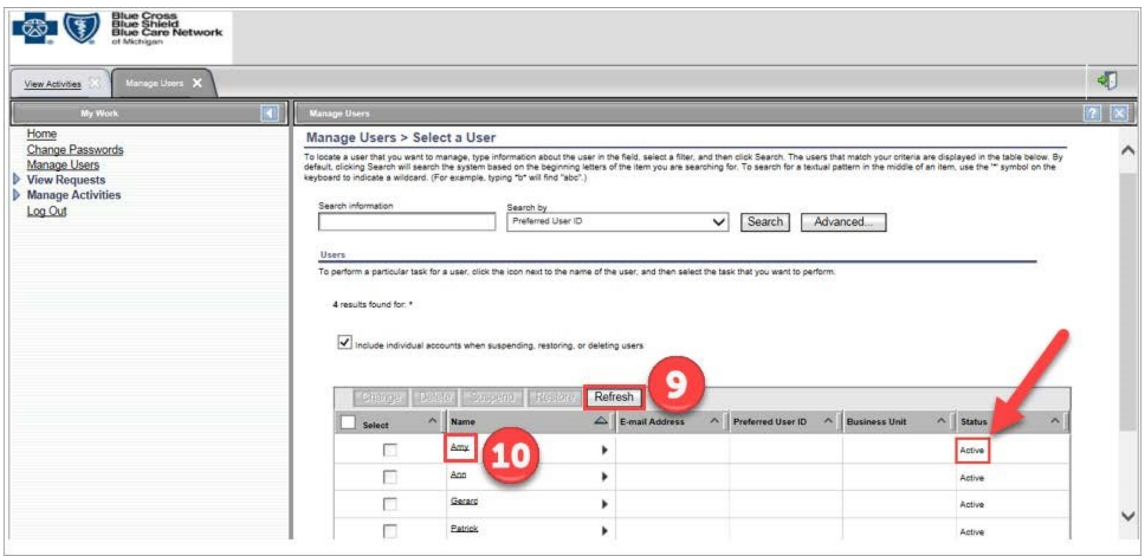
Type the user's information in the **Search** field.

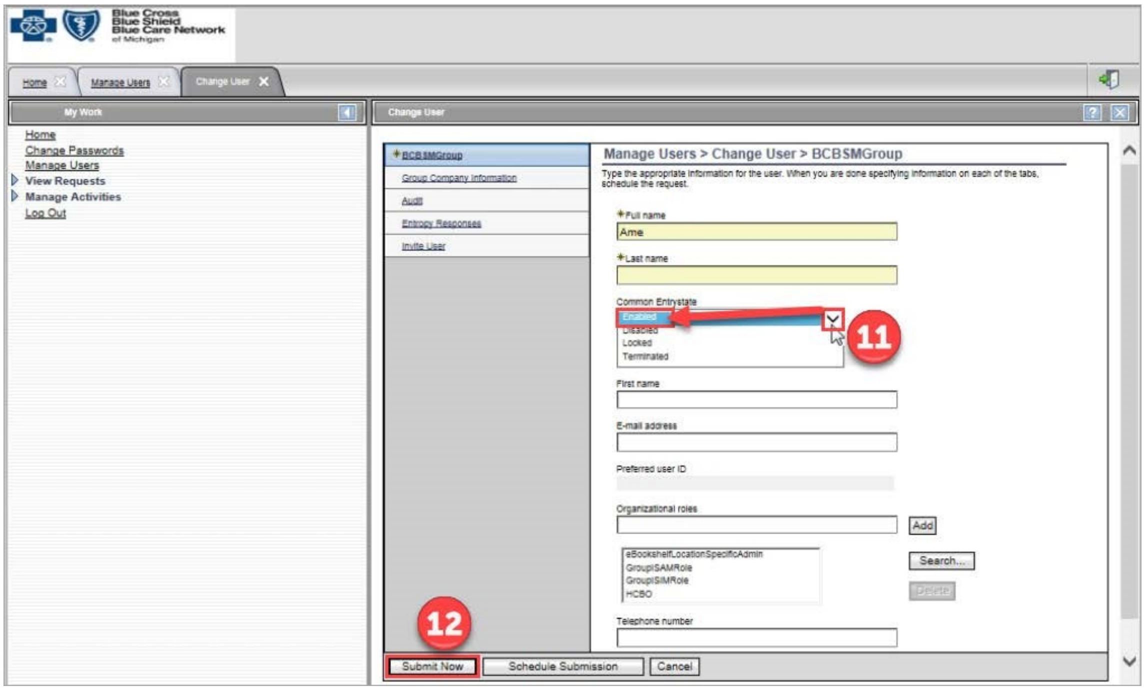
Note: The information required in the search depends on the filter selected in the **Search by** field. You can search by Preferred User ID, Full name, Email address, or Last name.



</td></tr>
</table>

3	Click **Search by** drop-down arrow to select the proper filter.
4	Click **Search**. **Note:** Any users matching the search criteria you selected are displayed.
5	Click the drop-down arrow to display the popup menu. 
6	Click **Restore**.
7	Click **Submit**. 
8	Click **Close**. **Note:** This closes the Restore Users tab and returns to Manage Users tab.

	
9	Click **Refresh**. **Note:** The user status displays Active. 
10	Click the name of the appropriate user.
11	Click the Entry State drop-down arrow and select **Enabled**.

	
12	Click **Submit Now**.

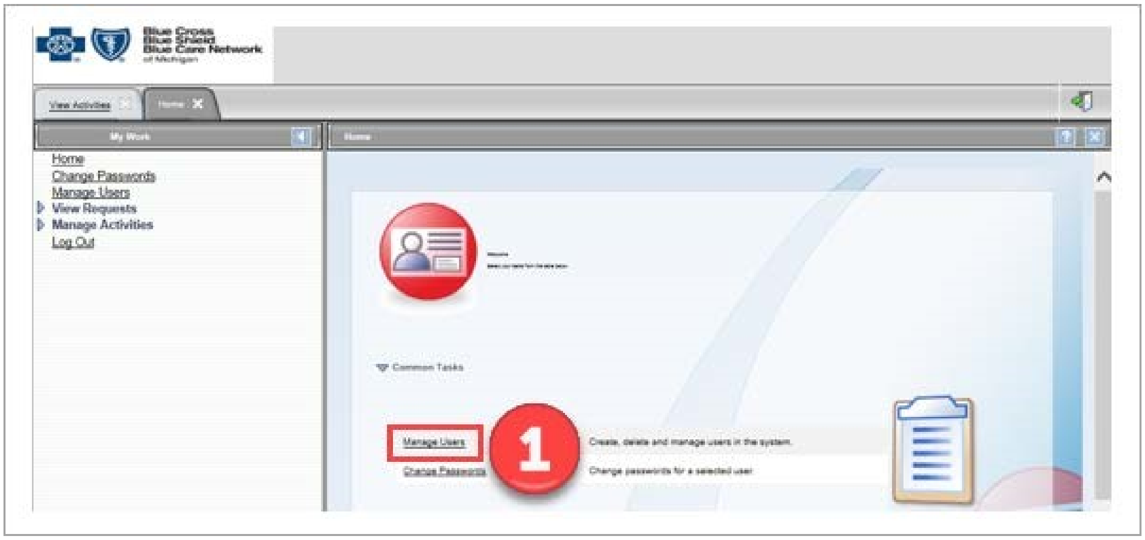
Task 15 **Deleting/Terminating a User's Account**

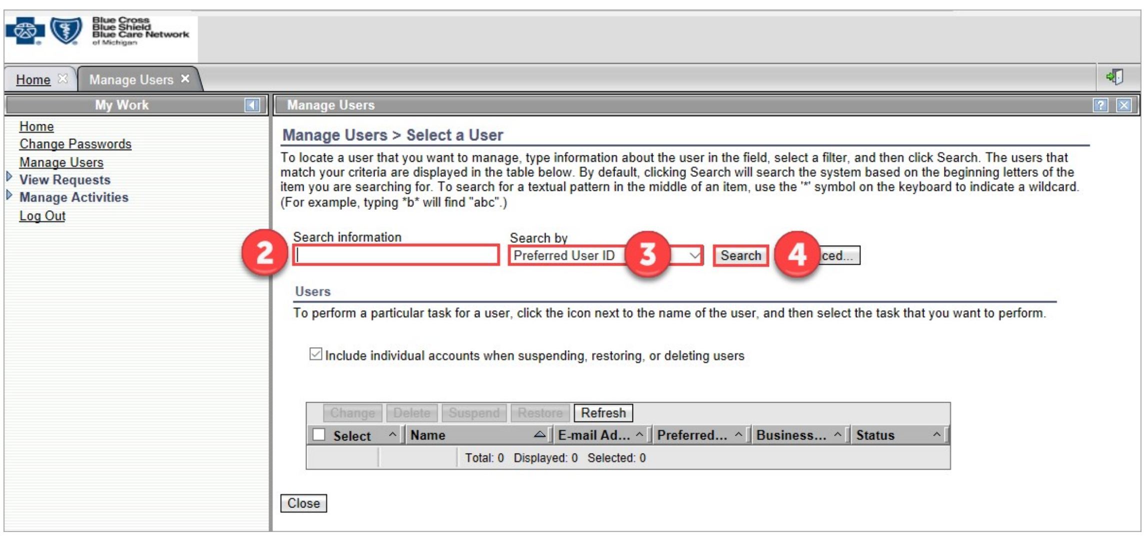
Deleting (terminating) a user account is permanent. Once deleted, the user account cannot be re-used. Users that are deleted will lose all roles, access (services), group code access, and will not be able to log in.

- **Note:** This task should be completed within 24 hours of user's change of job responsibilities or termination of employment.
- This task assumes you are successfully logged in and have selected **User Administration**. All fields marked with an asterisk (*) are required.

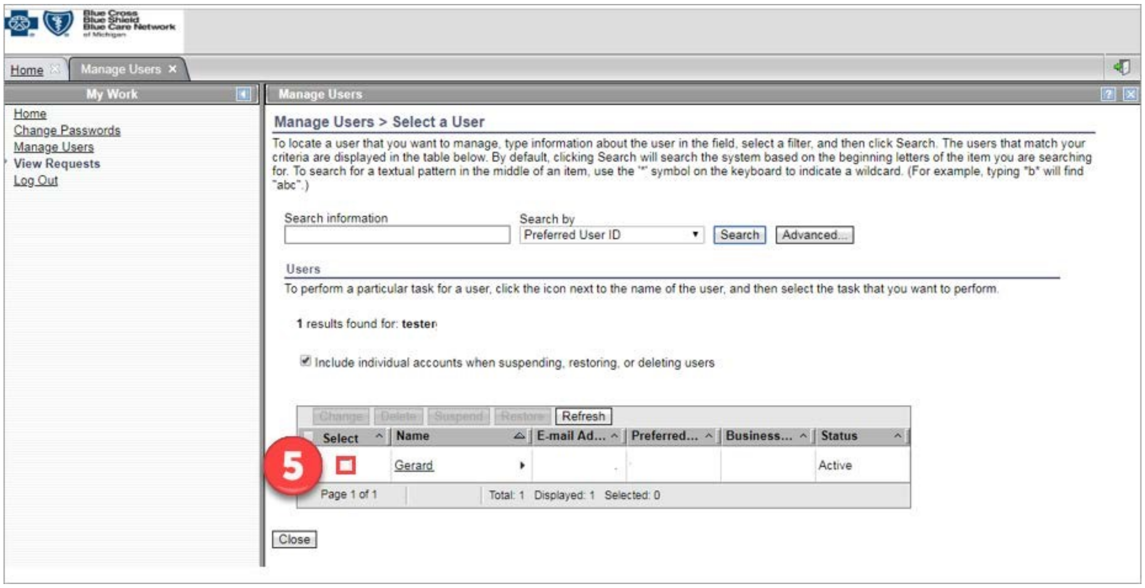
Complete the following steps to delete a user's account.

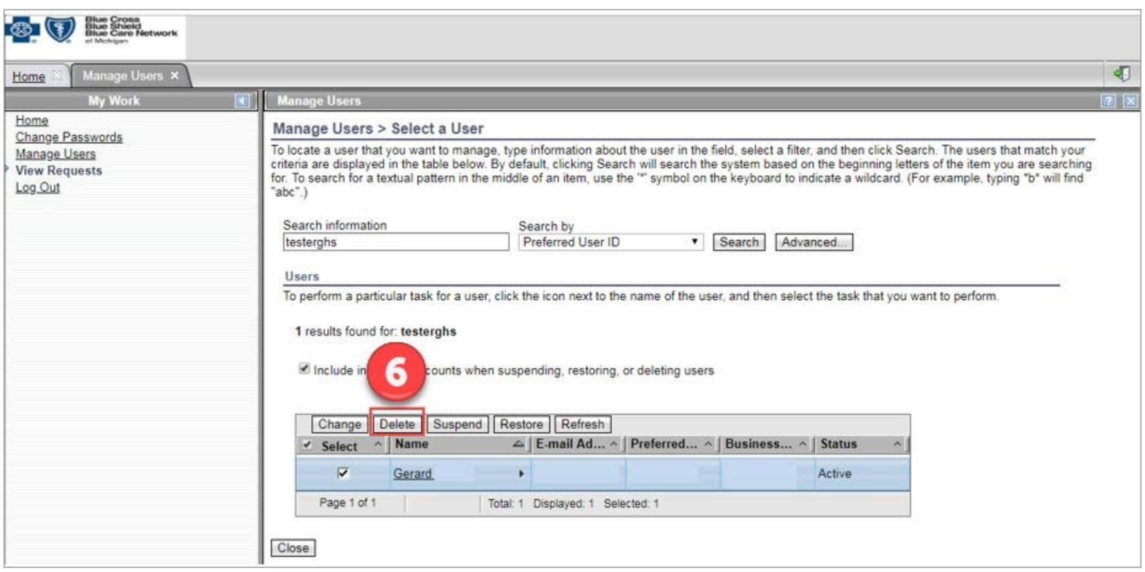
Step	Action

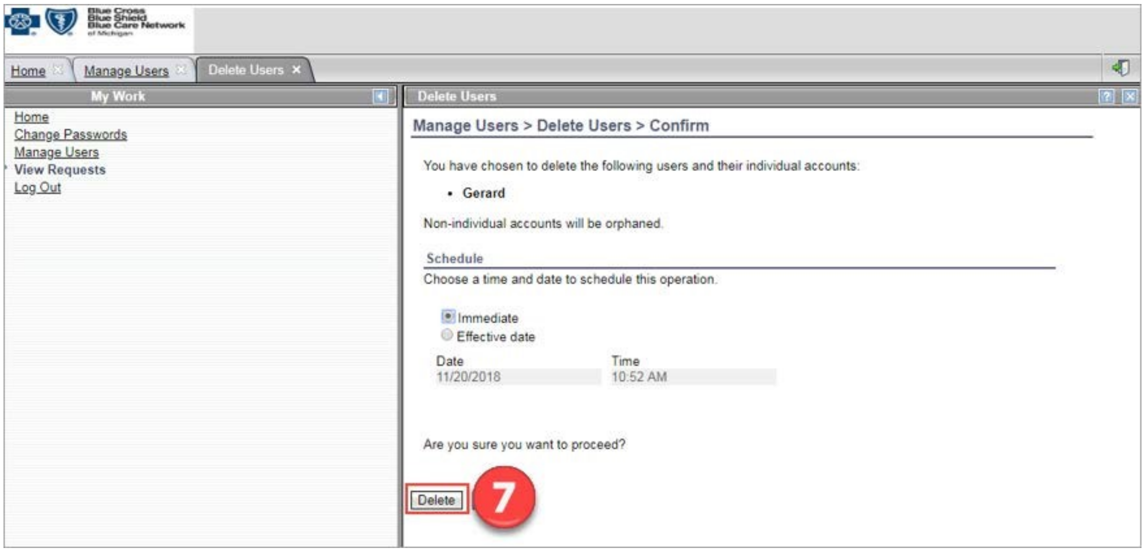
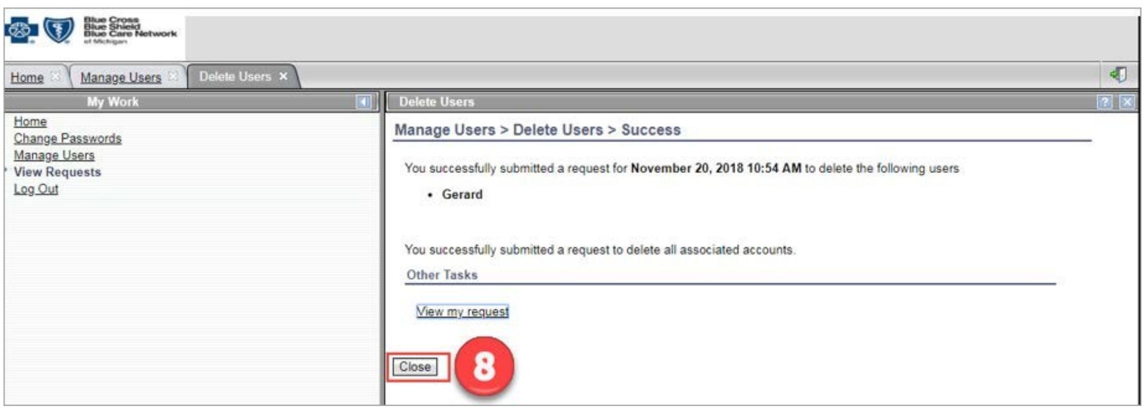
1	Click **Manage Users**. 
2	Type the user's information in the **Search** field. **Note:** The information required in the search depends on the filter selected in the **Search by** field. You can search by Preferred User ID, Full name, Email address, or Last name.

	
3	Click **Search by** drop-down arrow to select the proper filter.
4	Click **Search**. **Note:** Any users matching the search criteria you selected are displayed.

5	Click the checkbox next to the user you want to delete.
6	Click **Delete**.



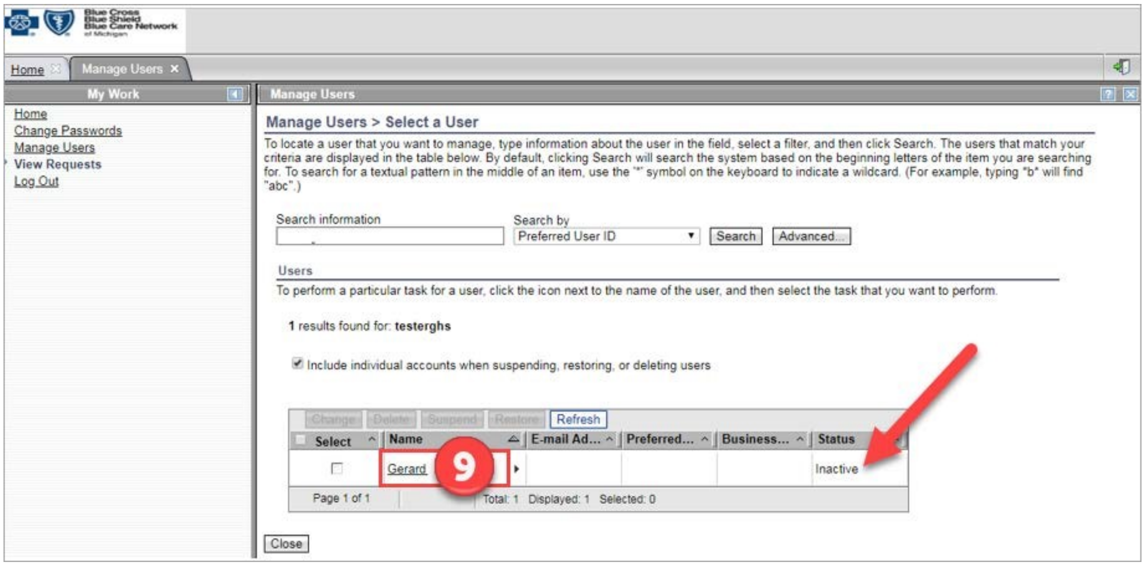


7	Click **Delete** to confirm. 
8	Click **Close**. **Note:** This closes the Delete Users tab and returns to Manage Users tab. 

<table>
<tr>
<td>9</td>
<td>

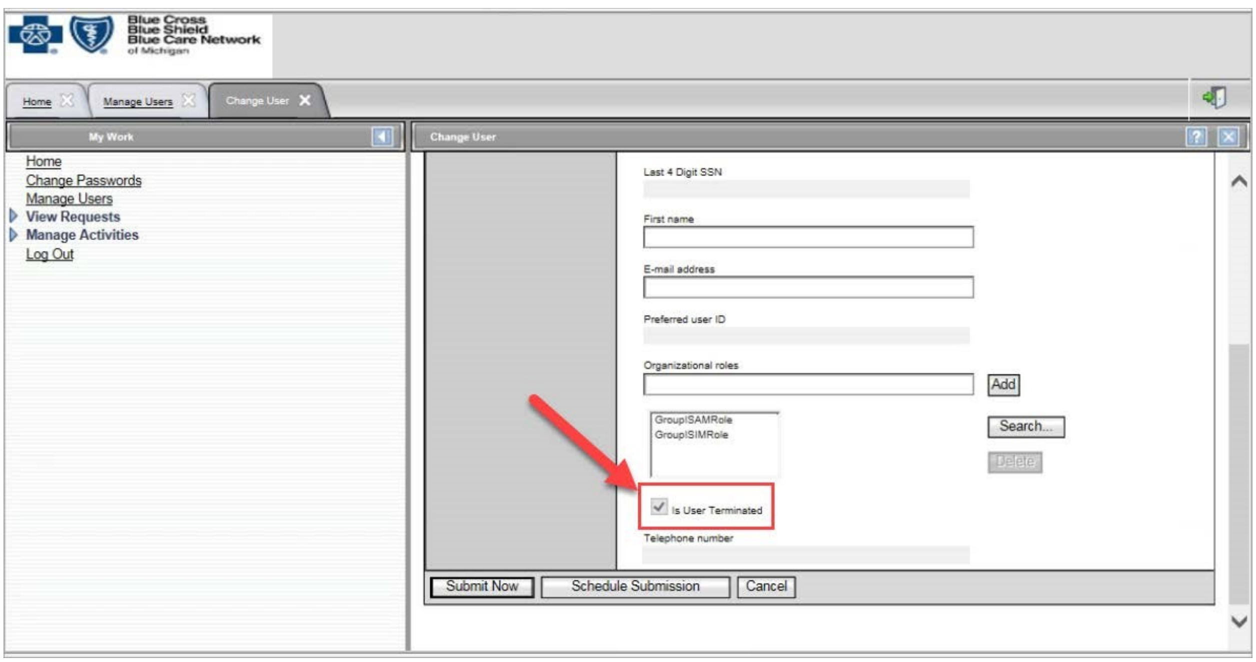
Click the user’s name link.

Note: The user’s status has changed to Inactive.



</td>
</tr>
</table>

The following screen displays. The bottom of the page shows a check mark indicating the user has been terminated.

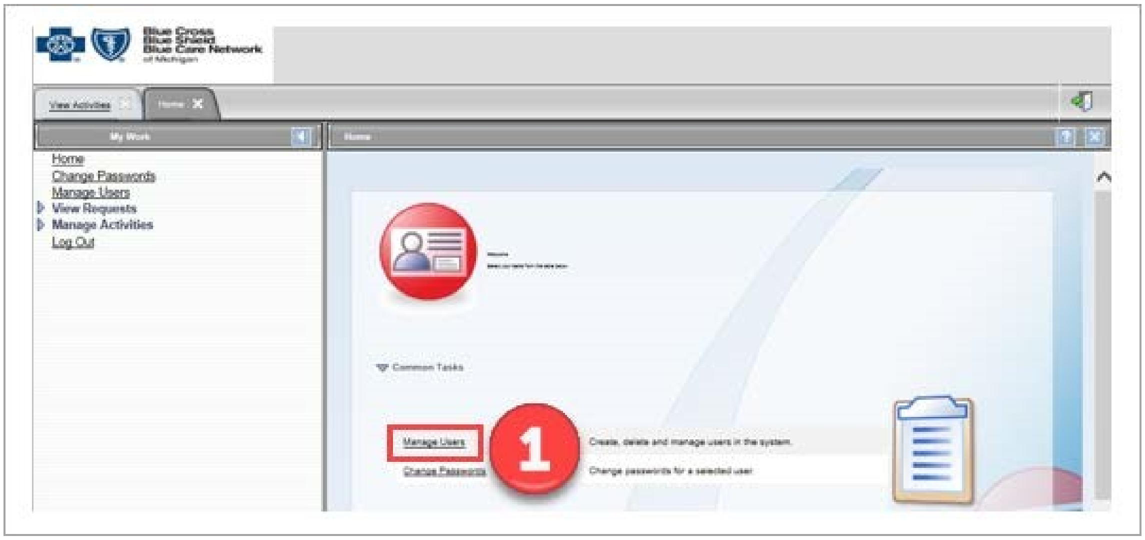
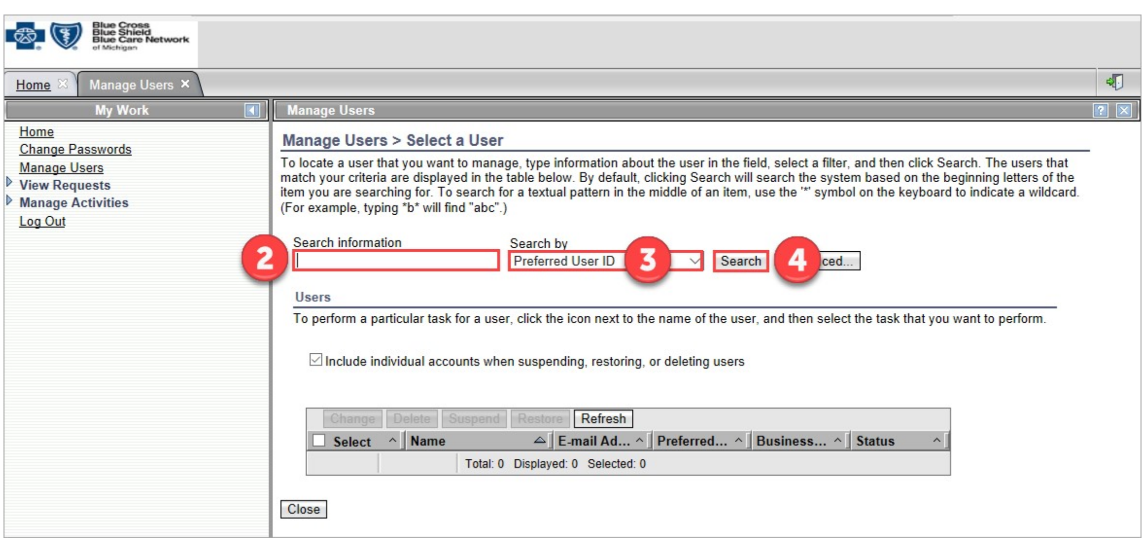


Task 16 **Adding Services to a User**

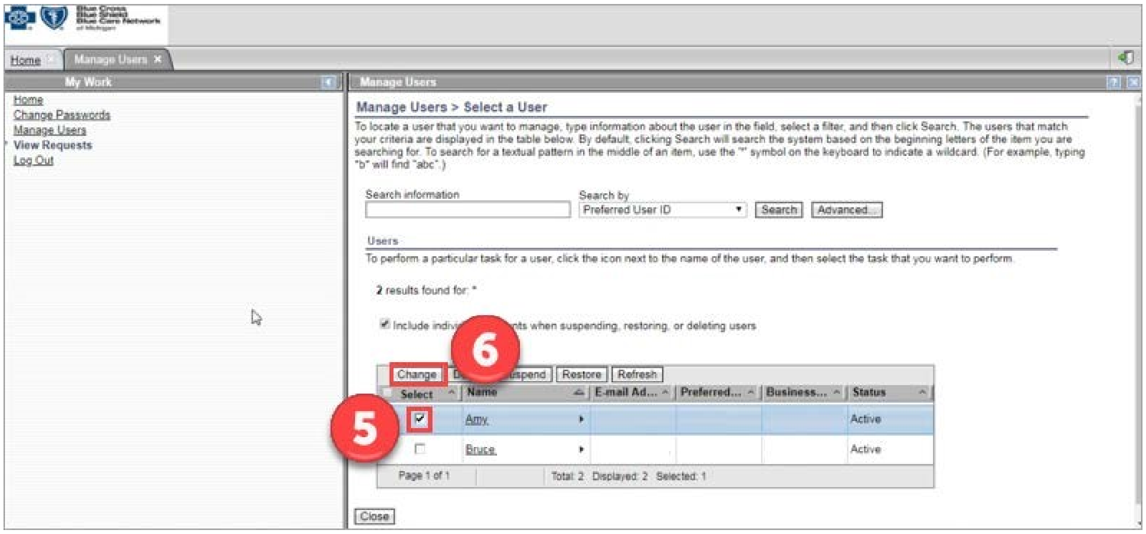
An administrator can grant the necessary services to a user’s account. The administrator does not have to wait for a user to request access to services to grant access. Administrators are always limited to granting only those services to which their company has access.

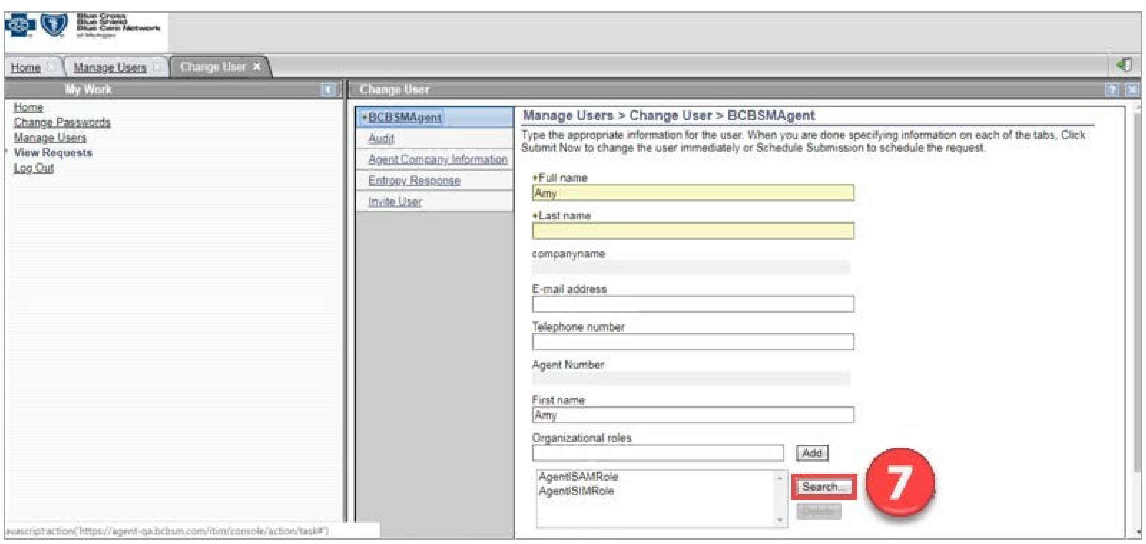
- **Note:** This task assumes you are successfully logged in and have selected **User Administration**. All fields marked with an asterisk (*) are required.

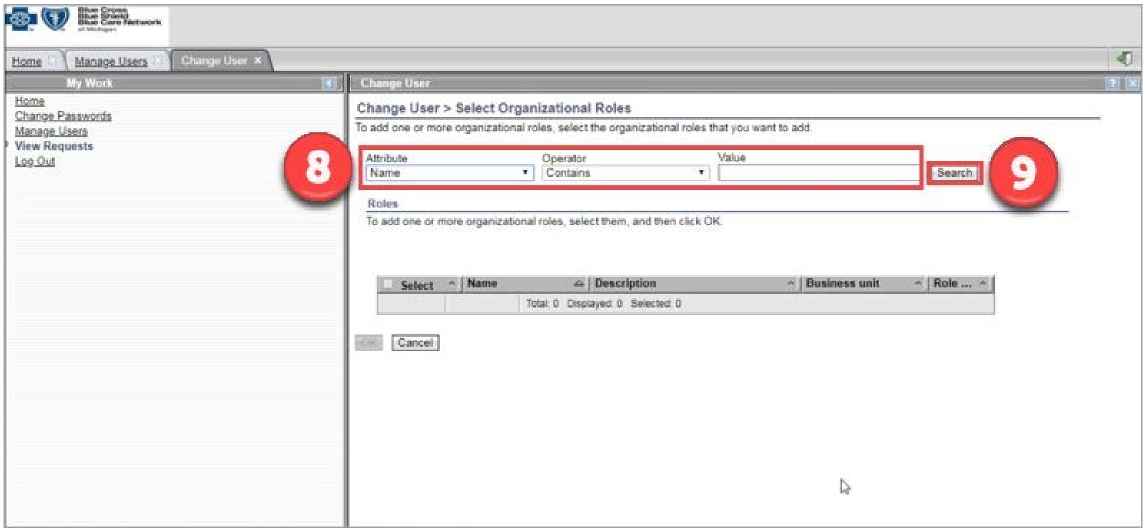
Complete the following steps to add services to a user.

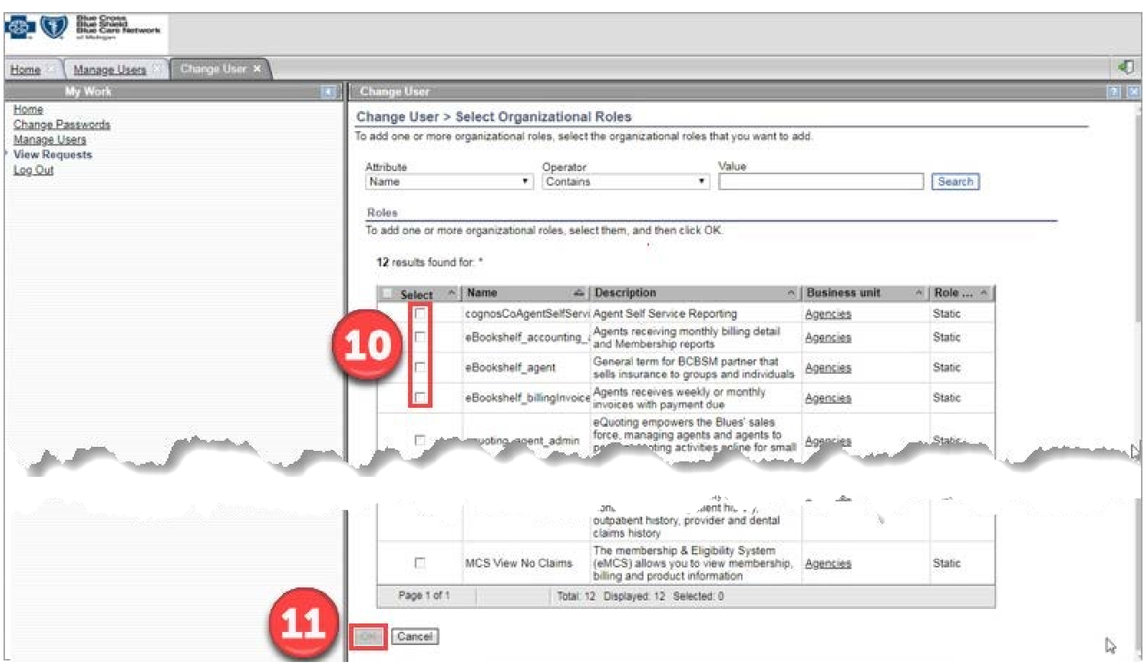
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click the Manage Users link.

</td></tr>
<tr><td>2</td><td>Type the user’s information in the Search field.
Note: The information required in the search depends on the filter selected in the Search by field. You can search by Preferred User ID, Full name, Email address, or Last name.</td></tr>
<tr><td></td><td>
</td></tr>
<tr><td>3</td><td>Click Search by drop-down arrow to select the proper filter.</td></tr>
</table>

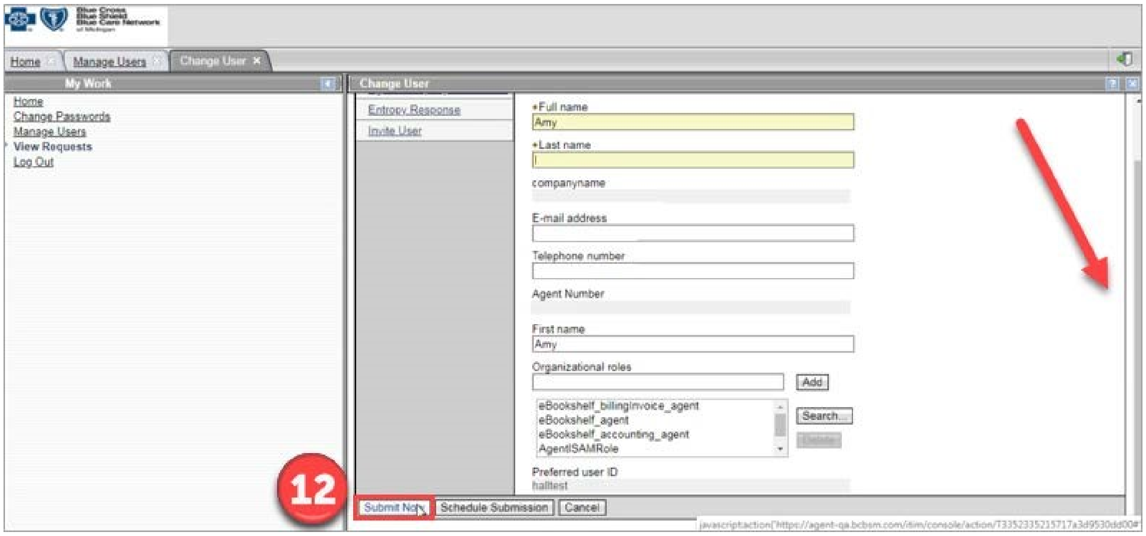
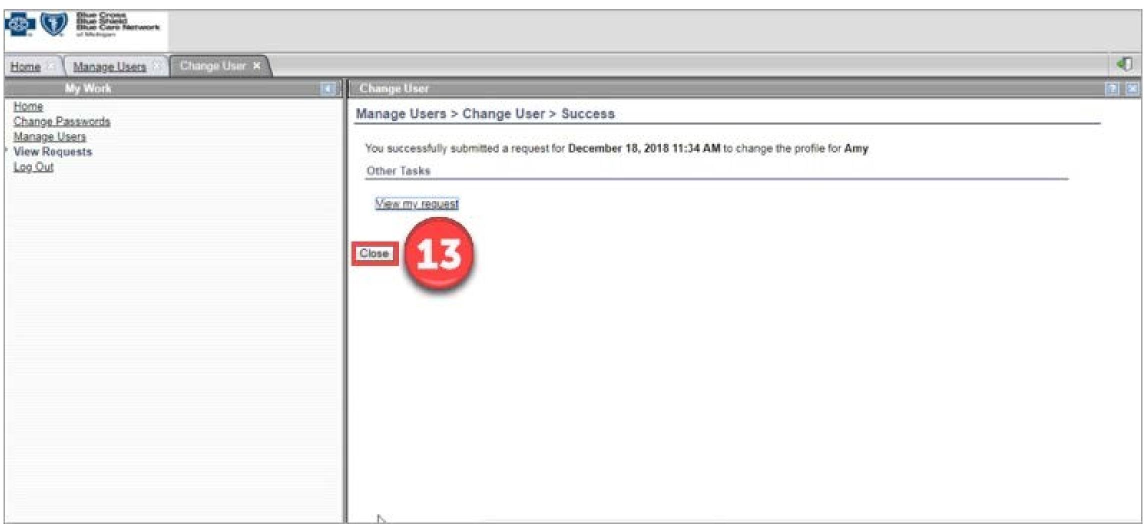
<table>
<tr><td>4</td><td>Click Search.
Note: Any users matching the search criteria you selected are displayed.</td></tr>
<tr><td>5</td><td>Click the checkbox next to the user you want to add services (roles) to.


</td></tr>
<tr><td>6</td><td>Click Change.</td></tr>
<tr><td>7</td><td>Click Search.</td></tr>
</table>

<table>
<tr><td></td><td>

</td></tr>
</table>

<table>
<tr><td>8</td><td>Click the drop-down arrows and/or type the search criteria in the three fields to display the appropriate services (roles).

</td></tr>
<tr><td>9</td><td>Click Search.</td></tr>
<tr><td>10</td><td>Click the checkbox(es) next to the service(s) you want to add.
Note: The services displayed depend on the type of user (i.e. Agent, Group, Association/Chamber) viewing them.</td></tr>
</table>

<table>
<tr><td></td><td>
</td></tr>
<tr><td>11</td><td>Click OK.</td></tr>
</table>

12	Scroll to the bottom of the screen and click **Submit Now**. 
13	Click **Close**. **Note:** The request has been submitted successfully.
	

Task 17 **Removing Access (Service) from a User**

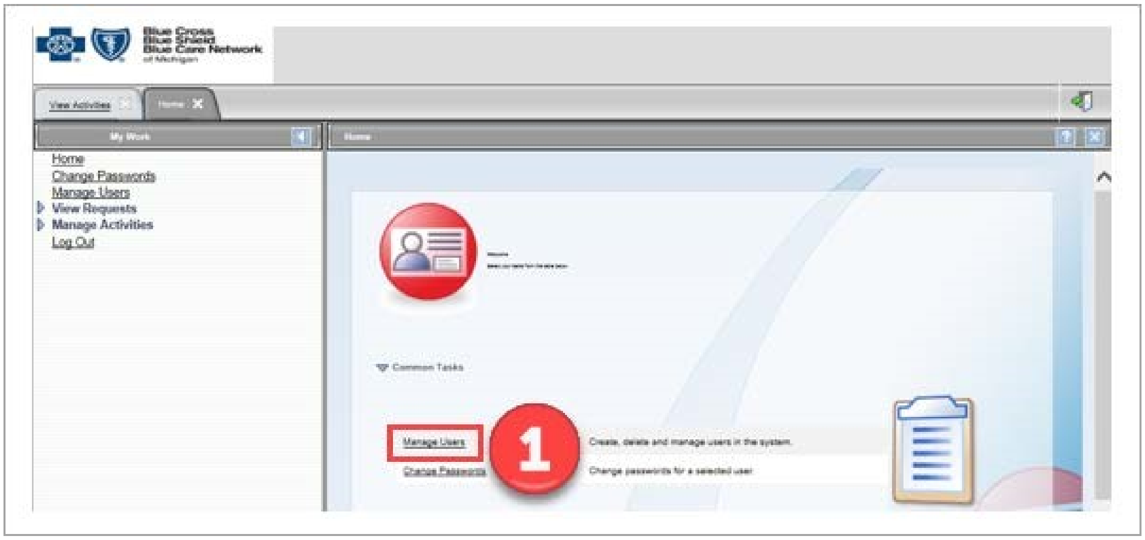
If a user no longer needs to have certain access (services), the administrator can revoke the unnecessary access from the user.

- **Note:** This task assumes you are successfully logged in and have selected **User Administration**. All fields marked with an asterisk (*) are required.

Complete the following steps to remove services from a user.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>

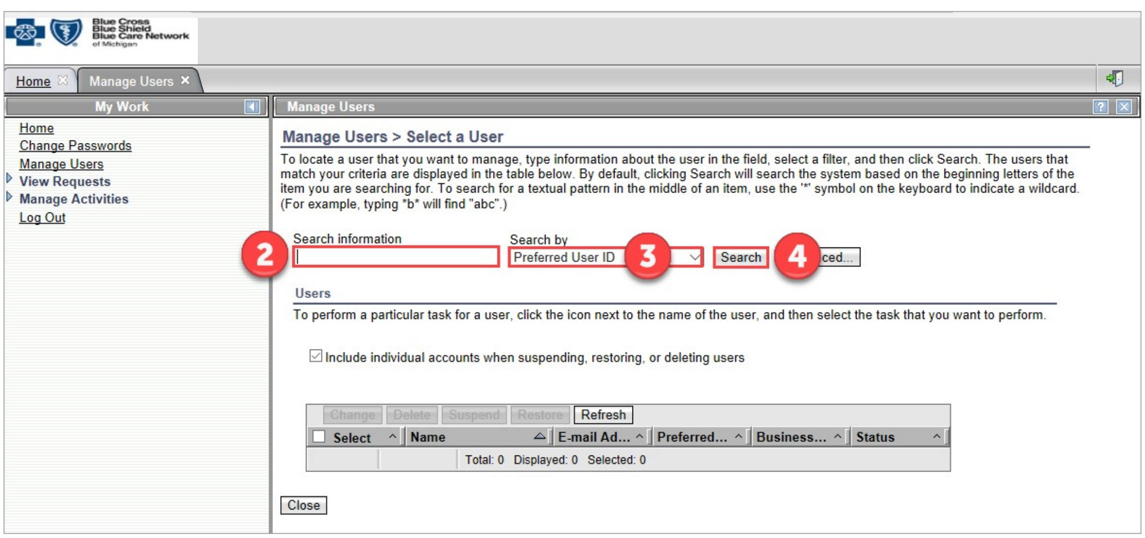
Click the **Manage Users** link.



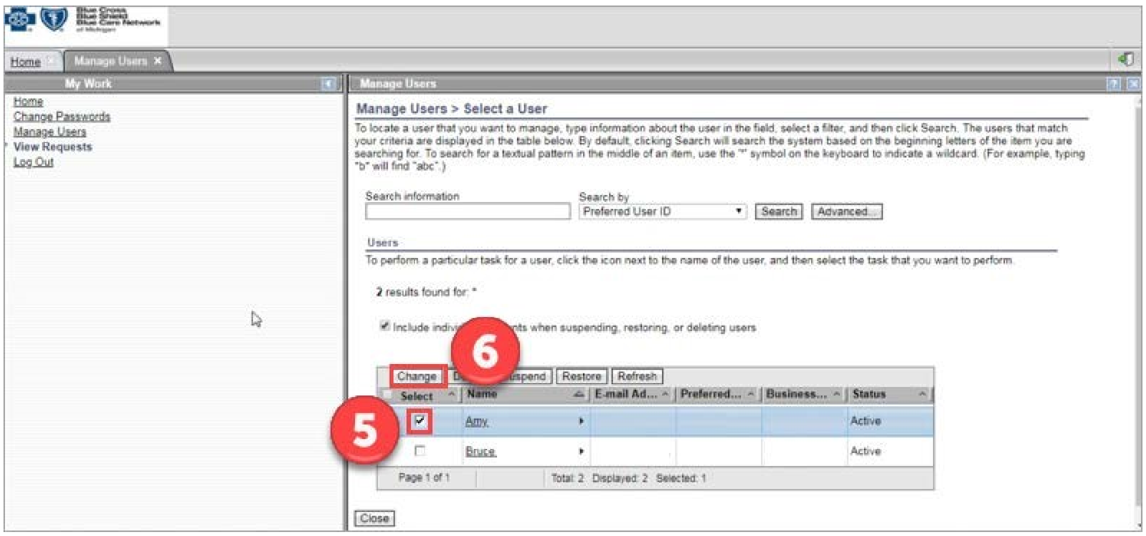
</td></tr>
<tr><td>2</td><td>

Type the user's information in the **Search** field.

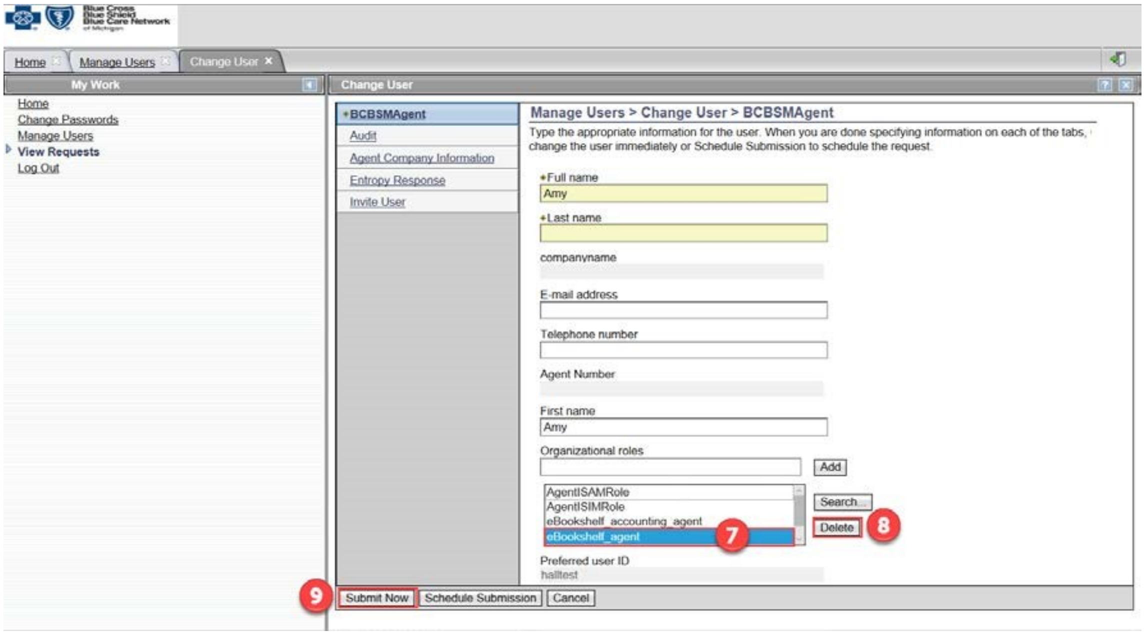
Note: The information required in the search depends on the filter selected in the **Search by** field. You can search by Preferred User ID, Full name, Email address, or Last name.

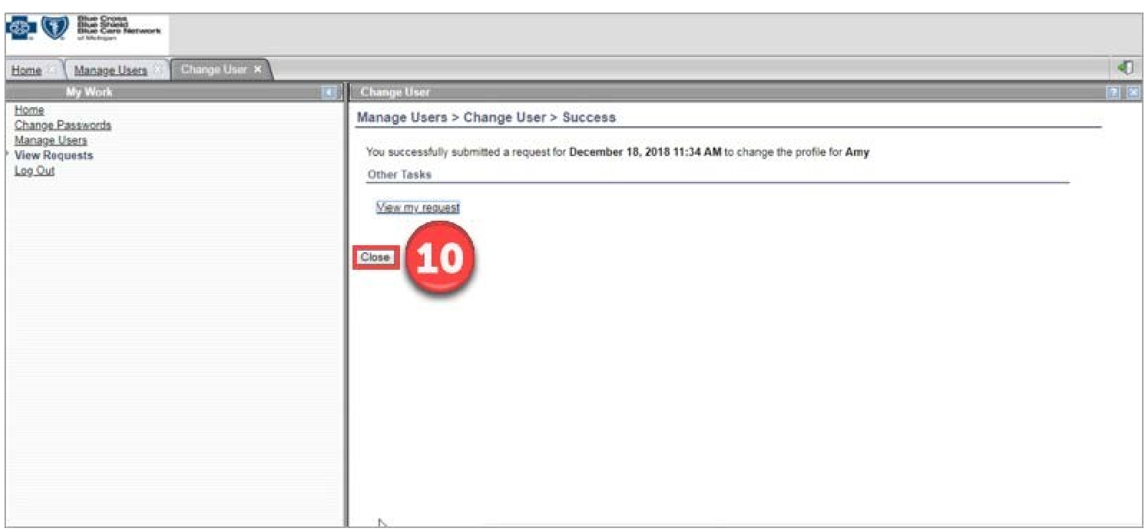


</td></tr>
</table>

3	Click **Search by** drop-down arrow to select the proper filter.
4	Click **Search**. **Note:** Any users matching the search criteria you selected are displayed.
5	Click the checkbox next to the user you want to remove services (roles) from. 
6	Click **Change**.

<table>
<tr><td>7</td><td>Select the role (service) to be removed.

Note: The services displayed depend on the type of user (i.e. Agent, Group, Association/Chamber) viewing them.

</td></tr>
<tr><td>8</td><td>Click Delete.</td></tr>
<tr><td>9</td><td>Click Submit Now.</td></tr>
<tr><td>10</td><td>Click Close.

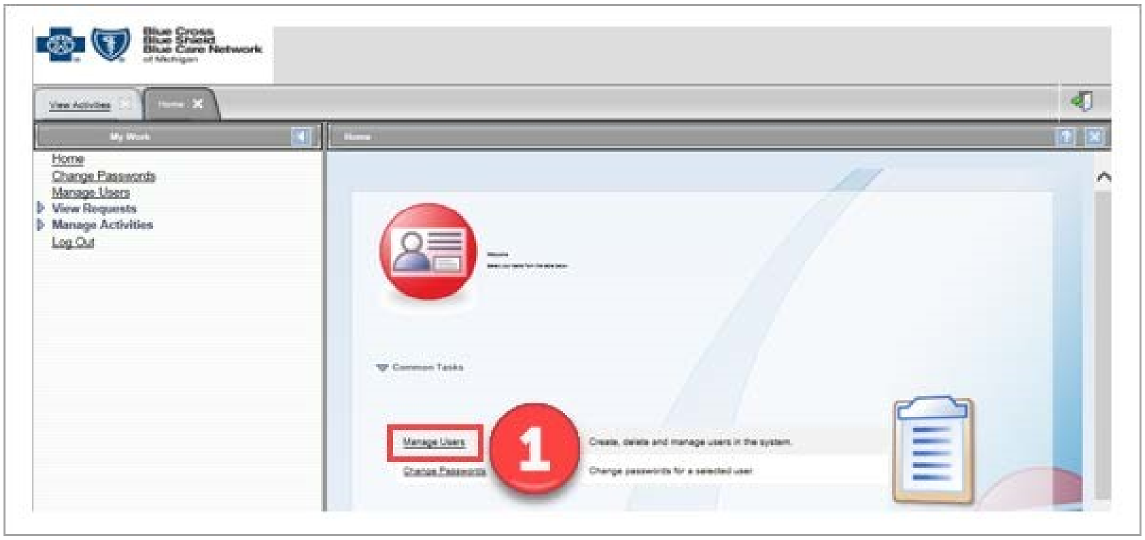
Note: The request has been submitted successfully.

</td></tr>
</table>

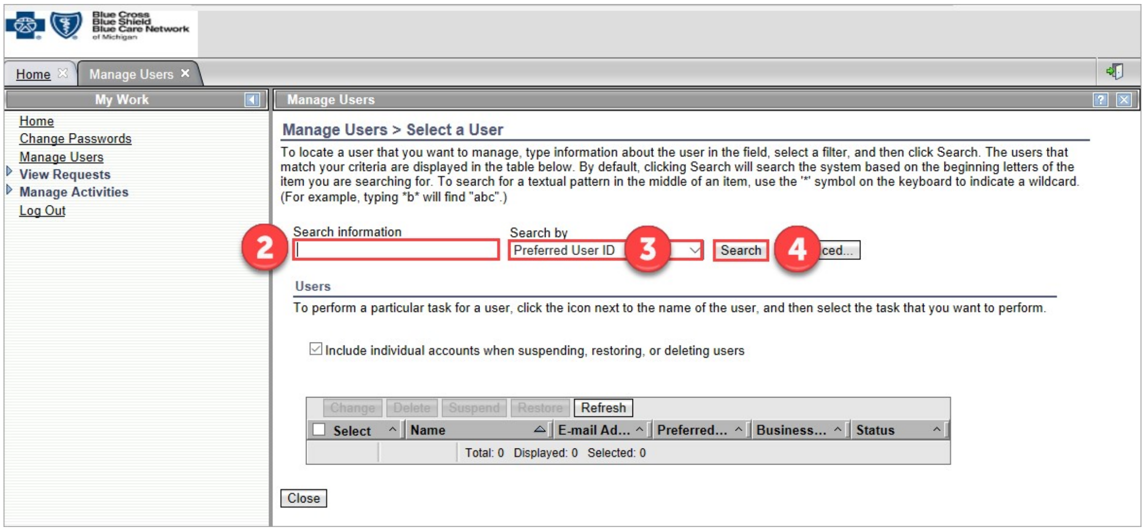
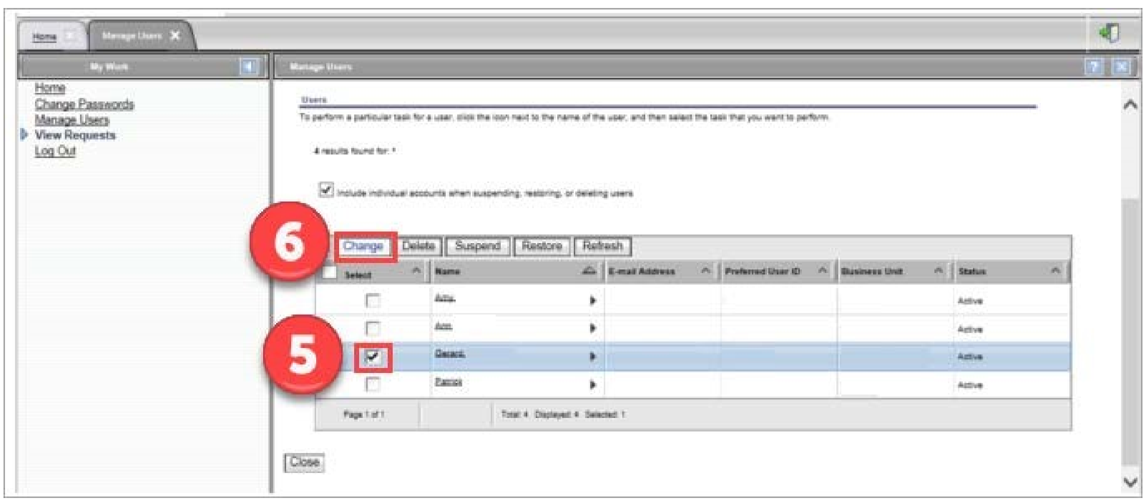
Task 18 **Assigning Principal Administrator**

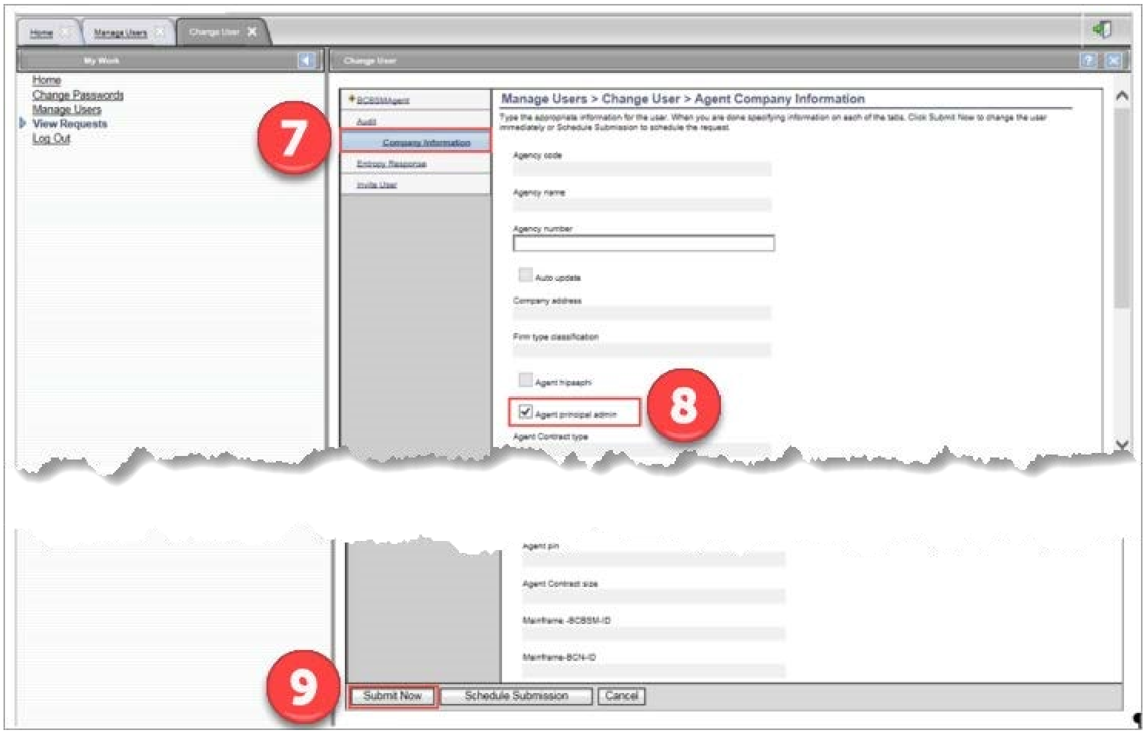
A need may arise to assign the administrator role to a user. After approving a user's registration request, the administrator can assign a user the role of Principal Administrator. The assigning administrator maintains the role as well.

- **Note:** This task assumes you are successfully logged in and have selected **User Administration**. All fields marked with an asterisk (*) are required.

Complete the following steps to assign user as Principal Administrator.

Step	Action
1	Click **Manage Users**. 
2	Type the user's information in the **Search** field. **Note:** The information required in the search depends on the filter selected in the **Search by** field. You can search by Preferred User ID, Full name, Email address, or Last name.

<table>
<tr><td></td><td>
</td></tr>
<tr><td>3</td><td>Click Search by drop-down arrow to select the proper filter.</td></tr>
<tr><td>4</td><td>Click Search.
Note: Any users matching the search criteria you selected are displayed.</td></tr>
<tr><td>5</td><td>Click the checkbox next to the user you want to assign as Principal Administrator.

</td></tr>
<tr><td>6</td><td>Click Change.</td></tr>
<tr><td>7</td><td>Click Company Information.
Note: Depending on the user, this field could be referring to the Agent, Group, or Association/Chamber.</td></tr>
</table>

	
8	Select **Principal Admin** checkbox. **Note:** Depending on the user, this field could be referring to the Agent, Group, or Association/Chamber.
9	Click **Submit Now**. **Note:** The Success screen appears. 
10	Click **Close**. **Note:** The principal role now displays under the user's roles.

3 Non-Administrator Procedures

BCBSM's Agent and Employer Secured Services administration functionality is designed to support the registration, access management and provisioning processes for users of the secure Agent and Group portal.

At the top of the landing page, there are three links available to assist users.

- Portal Access
- Group Code Access
- User Administration

Note: Users that are *not* Administrators cannot access User Administration

3.1 Portal Access – Non-Administrator

As a non-administrator, the **Portal Access** link at the top of the landing page is used to manage your ID. The tasks you can perform in this section are listed below:

- Changing password
- Requesting access (services)
- Updating user profile

Log in and click **Portal Access** to begin a task.

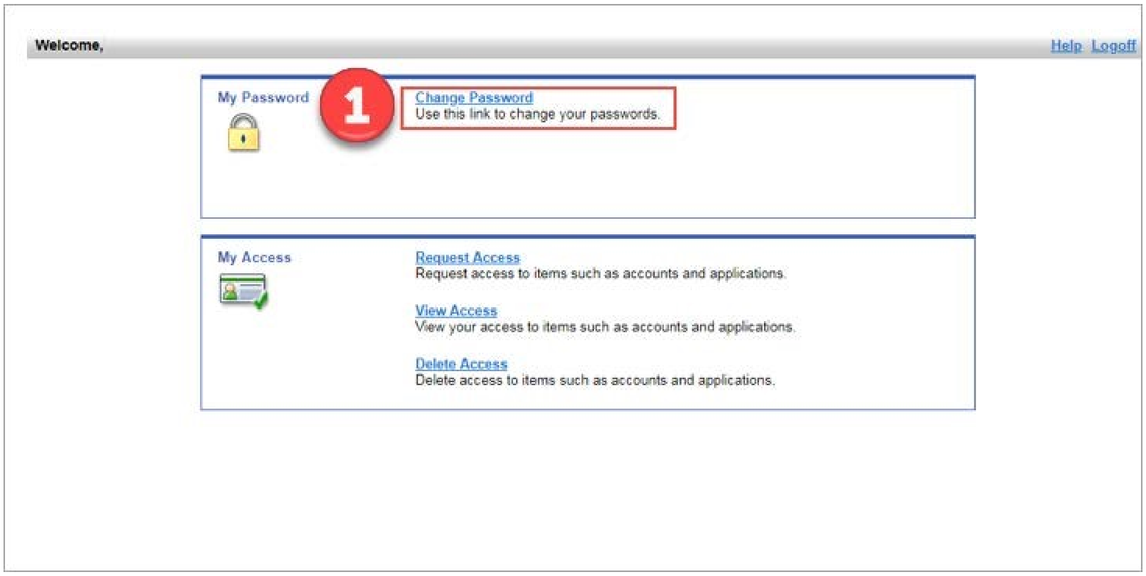
Task 19 **Changing Password After Login**

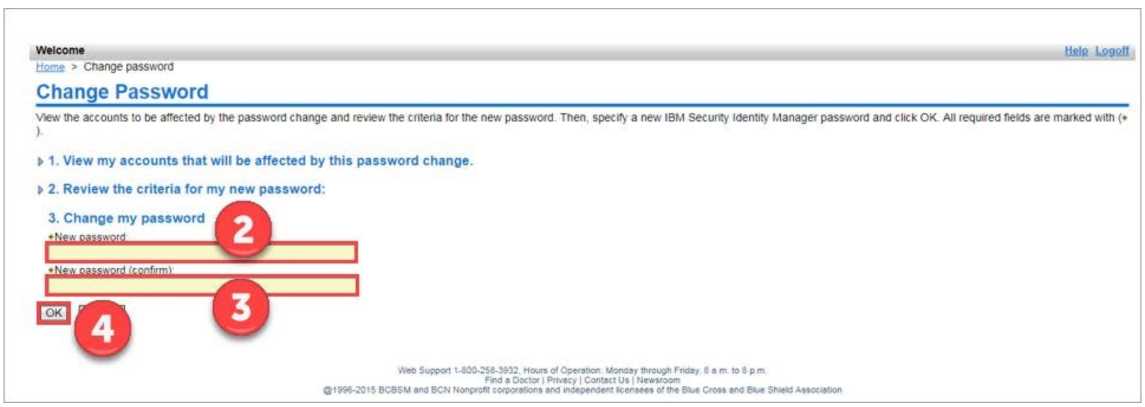
You can change your password after logging in to Secured Services.

- **Note:** This task assumes you are successfully logged in and have selected **Portal Access**. All fields marked with an asterisk (*) are required.

Complete the following steps to change your password after login.

Step	Action

<table>
<tr><td>1</td><td>Click Change Password.


</td></tr>
<tr><td>2</td><td>Type the New password.


</td></tr>
<tr><td>3</td><td>Re-type the New password to confirm.</td></tr>
<tr><td>4</td><td>Click OK.</td></tr>
</table>

The following screen displays to confirm your change password request has been submitted.

Request Submitted: Change Password

You have submitted a request. Below is the information available to you at this time.

Request Detail

Request ID:	3650926806125060852
Date Submitted:	November 20, 2018 2:48:27 PM
Request Type:	Change Password for Multiple Accounts
Access/Account:	on ISAM Service
	on ITIM Service

Related Tasks

To check on the status of your request, refer to the **View My Requests** page.
To perform other tasks go to the **IBM Security Identity Manager Home** page.

Web Support 1-800-258-3932, Hours of Operation: Monday through Friday, 8 a.m. to 8 p.m.
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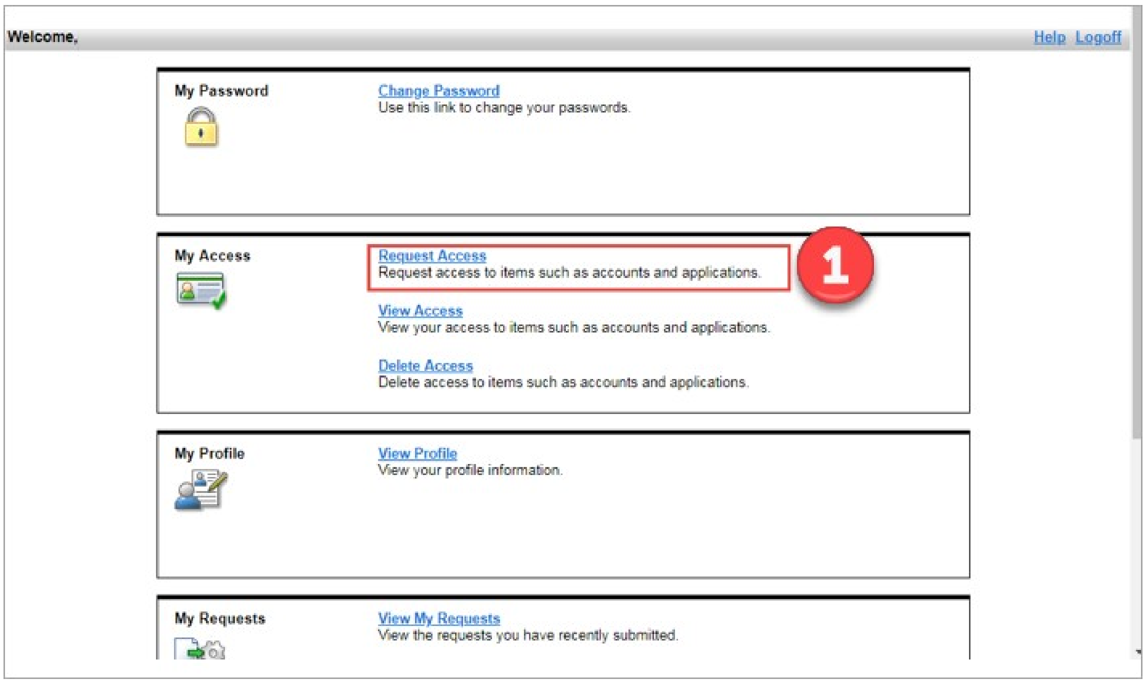
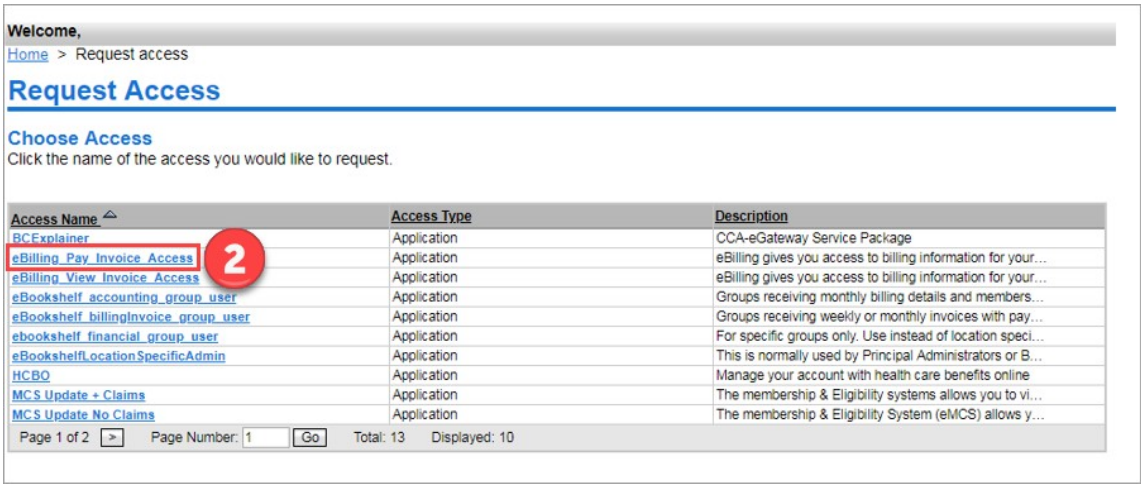
Task 20 **Requesting Access (Services)**

All users can request to have an available access (service) added to their ID.

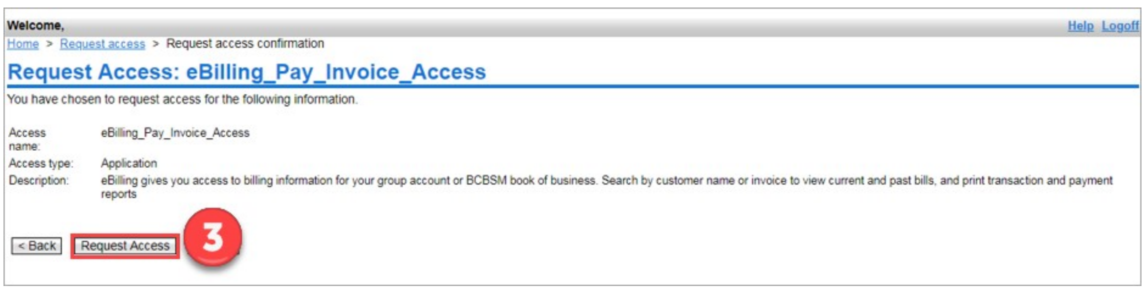
- **Note:** This task assumes you are successfully logged in and have selected **Portal Access**. All fields marked with an asterisk (*) are required.

Complete the following steps to request access.

Step	Action
1	Click **Request Access**. 
2	Select desired **Access Name** from the list. **Note:** The access (services) displayed will vary based on the type of user (i.e. Agent, Group, Association/Chamber).

<table>
<tr><td></td><td>


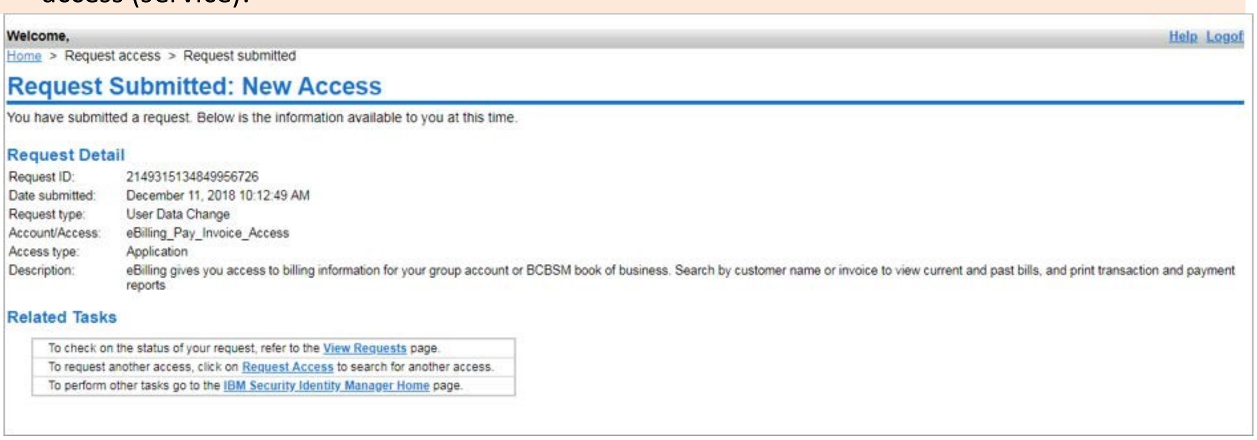
</td></tr>
<tr><td>3</td><td>
Click the Request Access button.



</td></tr>
</table>

The following screen displays to confirm the access (service) request has been submitted.

- **Note:** An email notification is sent to the Administrator to approve/reject the requested access (service).



Task 21 **Updating User Profile**

You can view and/or change your user profile information in the **My Profile** section. There are five hyperlinks in the left navigation window that make up the personal user profile. They are:

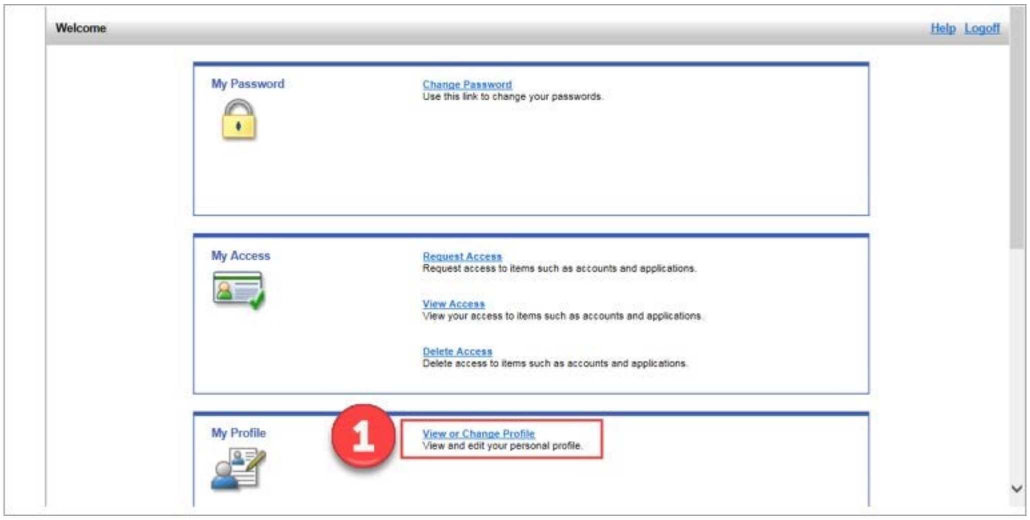
BCBSM Agent (or BCBSM Group), Agent Company Information (or Group Company Information), Audit, Entropy Responses, and Invite User.

- **Note:** This task assumes you are successfully logged in and have selected **Portal Access**. All fields marked with an asterisk (*) are required.

Complete the following steps to update your profile information.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>

Click **View or Change Profile**.

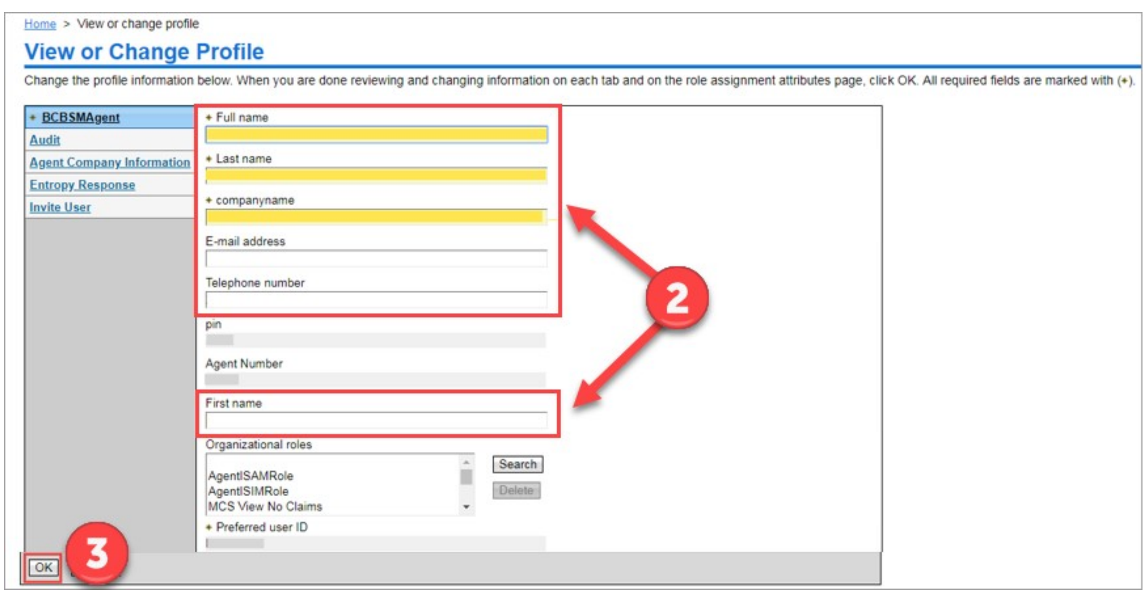


</td></tr>
<tr><td>2</td><td>

Key the updated information in the correct fields.

Note: The screen displayed above is for an Agent user. The update process is the same for a Group user, displaying fields and information relating to the group.

</td></tr>
<tr><td></td><td>

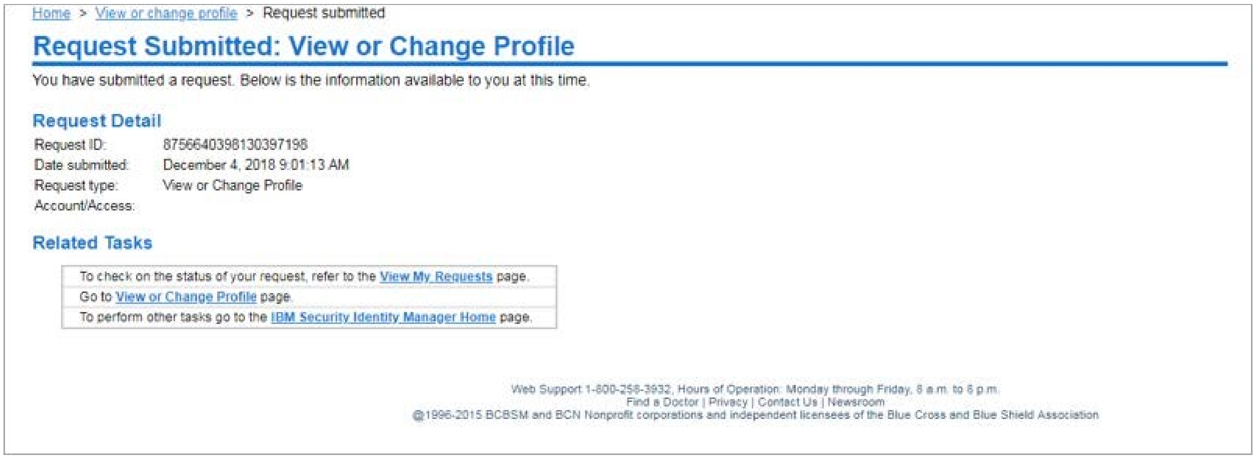


</td></tr>
<tr><td>3</td><td>

Click **OK**.

</td></tr>
</table>

The following screen displays to confirm the profile change request has been submitted.



3.2 Group Code Access - Non-Administrator

As a non-administrator, the **Group Code Access** link at the top of the landing page is used to manage your group code access. The tasks you can perform in this section are listed below: • Requesting Group Codes

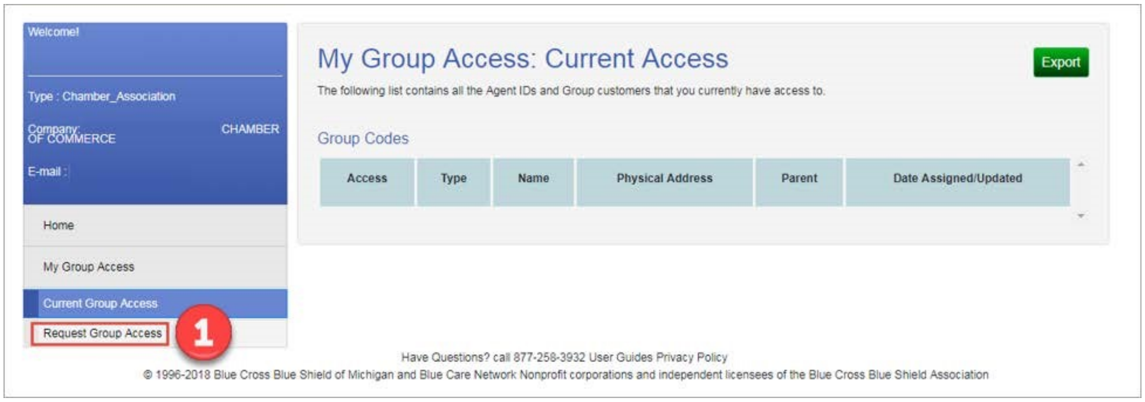
Log in and click **Group Code Access** to begin a task.

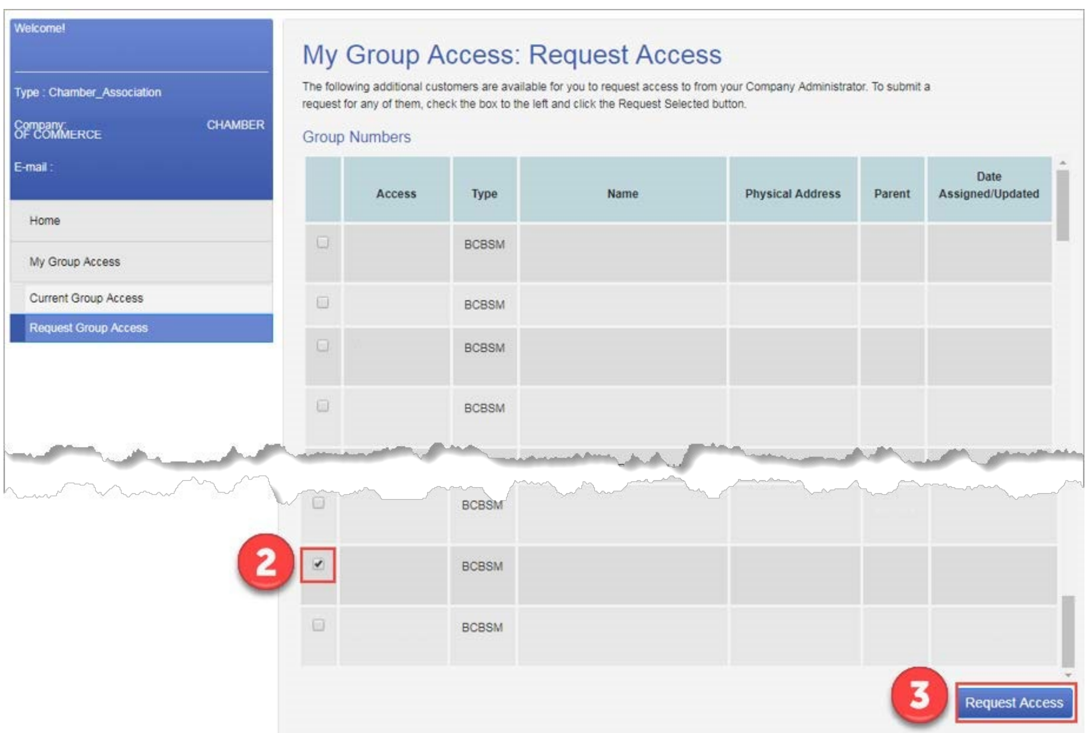
Task 22 **Requesting Group Codes**

Users can request access to available group codes.

- **Note:** This task assumes you are successfully logged in and have selected **Group Code Access**. All fields marked with an asterisk (*) are required.

Complete the following steps to request group codes.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click Request Group Access.


</td></tr>
<tr><td>2</td><td>Select the checkbox(es) for the Group Code(s) you want to request.


</td></tr>
<tr><td>3</td><td>Click Request Access.</td></tr>
</table>