

Agent/Group Identity Manager - Desk Level Procedures

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

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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

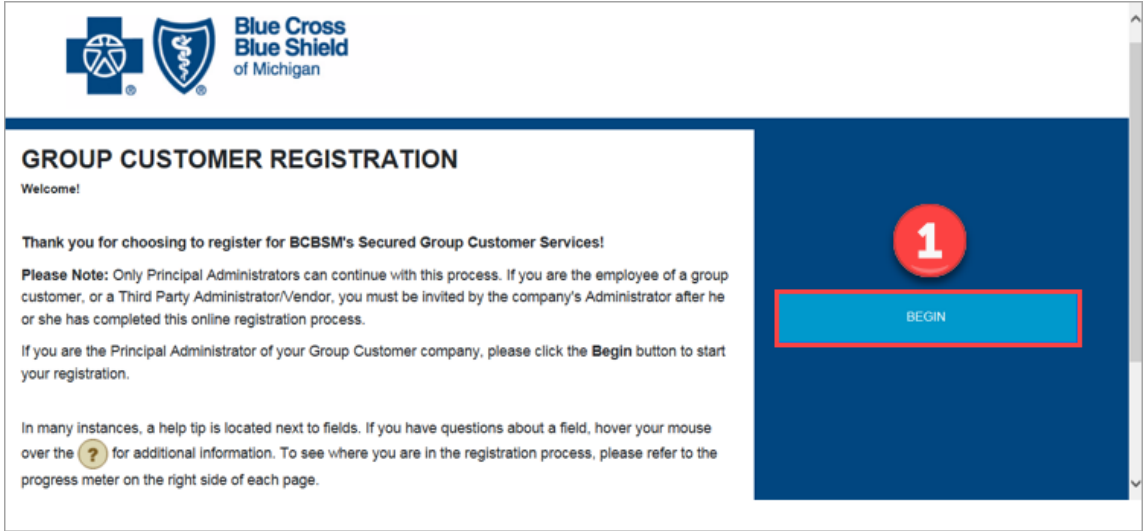
The screenshot displays the Blue Cross Blue Shield of Michigan website. The header includes the logo, navigation links (HOME, EMPLOYERS, AGENTS, PROVIDERS), a 'Contact Us' link, and a search bar. A secondary navigation bar contains links for 'Find Plans', 'Health Insurance 101', 'For Members', 'About Us', 'Help', 'Already a Member?', and a 'LOGIN' dropdown menu. The main content area on the left lists 'Browse our plans:' with categories: Individual and Family, Medicare, Medicaid Plans, and Employers. Below these are buttons for 'Get a Quote' and 'Find a Doctor'. A large image of a person sitting on a couch is visible in the background. A 'Log in as a:' modal is open, showing options for Member, Employer, Provider, and Agent. The 'Employer' option is selected. The login form includes fields for 'Username:' (with placeholder 'Enter your username') and 'Password:' (with placeholder 'Enter your password'), a green 'LOGIN' button, and links for 'Forgot your username or password?' and 'Get login help'. At the bottom of the modal, it says 'Not Registered? Get access to your employer portal. Register Now'.

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.

Step	Action
1	<p>Click Begin.</p> <p>Note: The screens displayed in this task are for groups. The agent and chamber screens are similar.</p> 
2	Select the I Agree radio button and click Continue .

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

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.



GROUP CUSTOMER REGISTRATION

Type of Group Customer

Please select what the type of Group Customer for which you are the Principal Administrator. If you are not sure what type of Group Customer you are, please contact your Blue Cross representative for assistance.

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.

Please select your Group Customer type:

☒ Group
 ☐ Association/Chamber
 ☐ Third Party Administrator

PREVIOUS CONTINUE

Start

1

2









3









7

8

End

4	<p>Type the BCBSM or BCN Group Number, First Name, Last Name, and PIN and then click Continue.</p> <p>Note: This step may take time, while the entered information is verified. Unless you receive an error do not back out of this step.</p> <div data-bbox="313 384 1450 1176"><p>REGISTRATION Administrator Registration</p><p>You have selected the 'Group' type. Please fill out the form with the Group information</p><p>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.</p><div data-bbox="779 405 1437 892"><p>First, you must be confirmed as the Principal Administrator for your company and the information must exactly what is stored in BCBSM's systems. If you are unsure how your information is stored, please contact 877-722-6030. Information entered into this screen is not case sensitive, but it is special character sensitive, including spaces and/or hyphens.</p><table border="1"><tr><td>BCBSM Group Number</td><td>number</td><td>?</td></tr><tr><td colspan="3">OR</td></tr><tr><td>BCN Facets Number</td><td>number</td><td>?</td></tr><tr><td>First Name</td><td>FirstName</td><td>?</td></tr><tr><td>Last Name</td><td>LastName</td><td>?</td></tr><tr><td>PIN</td><td>PIN</td><td>?</td></tr></table><p>All fields Required</p></div><div data-bbox="779 955 1437 1165"><p>PREVIOUS CONTINUE</p></div><div data-bbox="1339 405 1388 1123"><p>1 2 3 4 5 7 8 End</p></div></div>	BCBSM Group Number	number	?	OR			BCN Facets Number	number	?	First Name	FirstName	?	Last Name	LastName	?	PIN	PIN	?
BCBSM Group Number	number	?																	
OR																			
BCN Facets Number	number	?																	
First Name	FirstName	?																	
Last Name	LastName	?																	
PIN	PIN	?																	
5	Confirm the information is correct and click Continue .																		


	<h2>GROUP CUSTOMER REGISTRATION</h2> <p>Company Profile</p> <p>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.</p> <div> <p>Please confirm that the information below is correct. If it is not correct, please contact BCBSM at 877-722-6030</p> <table> <tr><td>Company name</td><td>XXXXX</td></tr> <tr><td>Address 1</td><td>XXXXXX</td></tr> <tr><td>Address 2</td><td></td></tr> <tr><td>City</td><td>XXXXXX</td></tr> <tr><td>State</td><td>XX</td></tr> <tr><td>Zip code</td><td>XXXXXX</td></tr> </table> </div> <div> <p>Start</p> <p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>5</p> <p>6</p> <p>7</p> <p>8</p> <p>End</p> </div> <div> <p>PREVIOUS</p> <p>CONTINUE</p> </div>	Company name	XXXXX	Address 1	XXXXXX	Address 2		City	XXXXXX	State	XX	Zip code	XXXXXX
Company name	XXXXX												
Address 1	XXXXXX												
Address 2													
City	XXXXXX												
State	XX												
Zip code	XXXXXX												
6	<h2>GROUP CUSTOMER REGISTRATION</h2> <p>Create A User Profile</p> <p>Congratulations! You have completed your company registration. Now we need additional information to register you as a User. As we already have some of your information from previous screens, you will not need to re-input it unless your User Profile information should be different.</p> <p>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.</p> <div> <p>Please use the form below to enter your phone number and e-mail address.</p> <table> <tr><td>First Name</td><td>XXXXX</td></tr> <tr><td>Last Name</td><td>XXXXXX</td></tr> <tr><td>Phone Number</td><td>phone number </td></tr> <tr><td>PIN</td><td>XXXX</td></tr> <tr><td>E-Mail Address</td><td>e-mail address </td></tr> </table> <p>The First Name, Last Name, and PIN # fields are populated by BCBSM's systems.</p> </div> <div> <p>Start</p> <p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>5</p> <p>6</p> <p>7</p> <p>8</p> <p>End</p> </div> <div> <p>PREVIOUS</p> <p>CONTINUE</p> </div>	First Name	XXXXX	Last Name	XXXXXX	Phone Number	phone number 	PIN	XXXX	E-Mail Address	e-mail address 		
First Name	XXXXX												
Last Name	XXXXXX												
Phone Number	phone number 												
PIN	XXXX												
E-Mail Address	e-mail address 												
7	<p>Create a User Name and Password, and then click Continue.</p>												

	<p>GROUP CUSTOMER REGISTRATION Create User Name and Password</p> <p>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.</p> <div> <p>Please enter the User Name and password that you would like to use to access your Secured Services</p> <table border="1"> <tr> <td>User Name</td> <td><input type="text"/></td> <td></td> </tr> <tr> <td>Password</td> <td><input type="password"/></td> <td></td> </tr> <tr> <td>Confirm Password</td> <td><input type="password"/></td> <td></td> </tr> </table> <p>All fields Required</p> </div> <div> <p>PREVIOUS CONTINUE</p> </div> <div> <p>Start</p> <p>1</p> <p>2</p> <p>7</p> <p>8</p> <p>End</p> </div>	User Name	<input type="text"/>		Password	<input type="password"/>		Confirm Password	<input type="password"/>								
User Name	<input type="text"/>																
Password	<input type="password"/>																
Confirm Password	<input type="password"/>																
<p>8</p>	<p>Click the two drop-down arrows to select two different security Questions, type the Answers in the white boxes, and click Continue.</p> <p>Note: This step may take time. Unless you receive an error do not back out of this step.</p> <p>GROUP CUSTOMER REGISTRATION Security Questions and Answers</p> <p>Please use the form to the right to set up your security questions</p> <p>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.</p> <div> <p>Use the drop-downs to select and answer two if the following questions, these answers are case sensitive.</p> <table border="1"> <thead> <tr> <th>Question</th> <th>Answers</th> </tr> </thead> <tbody> <tr> <td>What is your mother's maiden name?</td> <td><input type="text"/></td> </tr> <tr> <td>What is your mother's maiden name?</td> <td><input type="text"/></td> </tr> <tr> <td>What is your father's middle name?</td> <td></td> </tr> <tr> <td>What city were you born in?</td> <td></td> </tr> <tr> <td>What is the first vehicle you drove?</td> <td></td> </tr> <tr> <td>What is your favorite food?</td> <td></td> </tr> <tr> <td>What is your pet's name?</td> <td></td> </tr> </tbody> </table> </div> <div> <p>PREVIOUS CONTINUE</p> </div> <div> <p>Start</p> <p>1</p> <p>2</p> <p>3</p> <p>7</p> <p>8</p> <p>End</p> </div>	Question	Answers	What is your mother's maiden name?	<input type="text"/>	What is your mother's maiden name?	<input type="text"/>	What is your father's middle name?		What city were you born in?		What is the first vehicle you drove?		What is your favorite food?		What is your pet's name?	
Question	Answers																
What is your mother's maiden name?	<input type="text"/>																
What is your mother's maiden name?	<input type="text"/>																
What is your father's middle name?																	
What city were you born in?																	
What is the first vehicle you drove?																	
What is your favorite food?																	
What is your pet's name?																	
<p>9</p>	<p>Verify that all the information you entered is correct and click Continue to complete your registration.</p> <p>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.</p>																

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	XXXXX
Type	XXXXX		

Auto-Granted Services

Start

1

2

3

4

5

6


7

8

End

PREVIOUS

CONTINUE

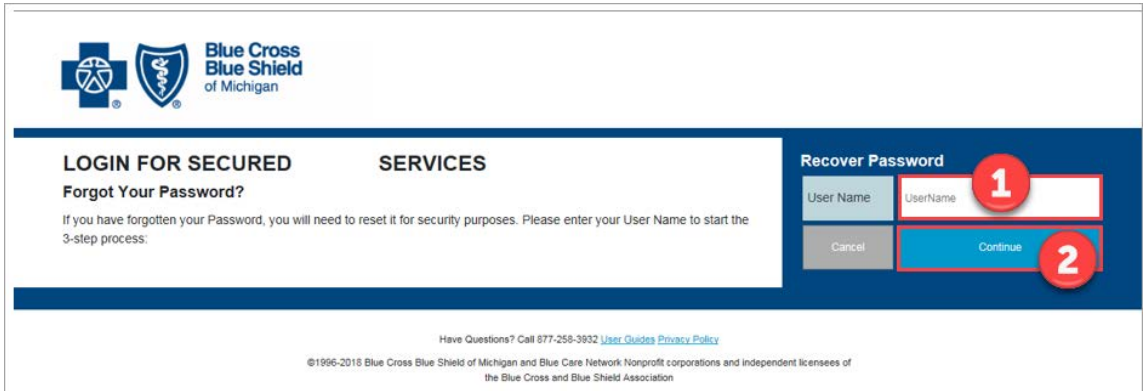
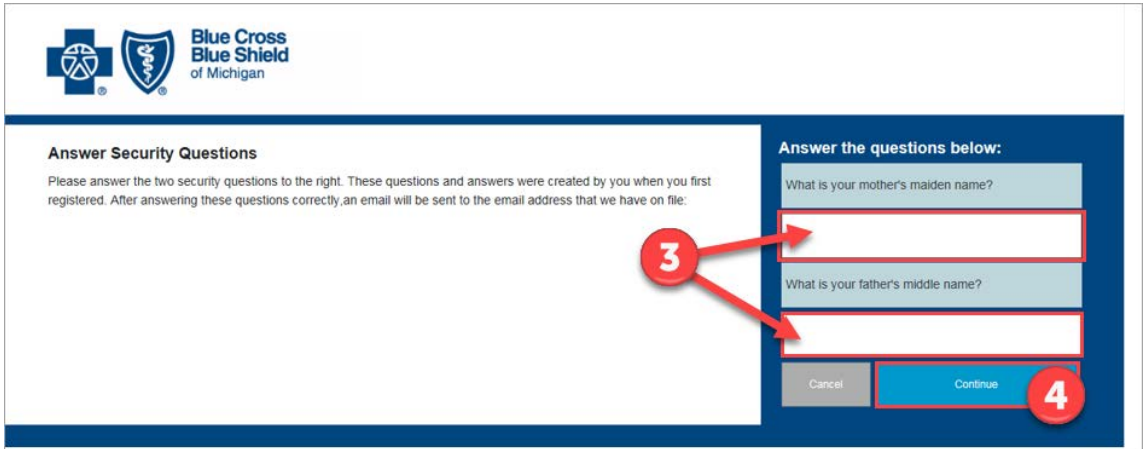


Task 2 Resetting Your Password

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.

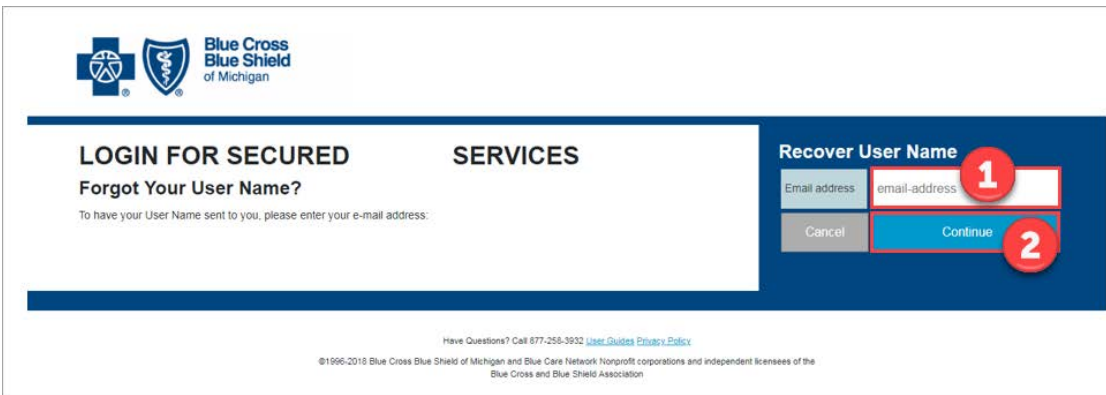
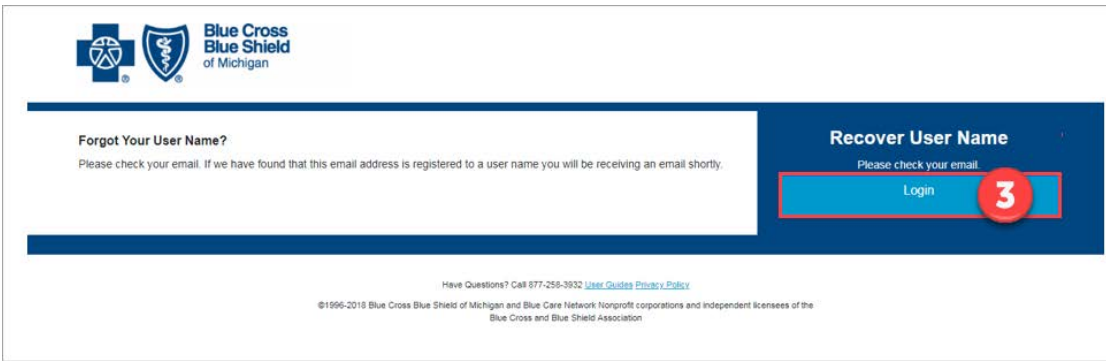
Step	Action
1	<p>Key your User Name.</p> 
2	Click Continue .
3	<p>Key answers to security questions.</p> 
4	Click Continue .

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	<p>Key your Email address.</p> 
2	<p>Click Continue.</p> <p>Note: Your User Name will be sent to the email address specified.</p>
3	<p>Click Login and continue login process.</p> 

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.

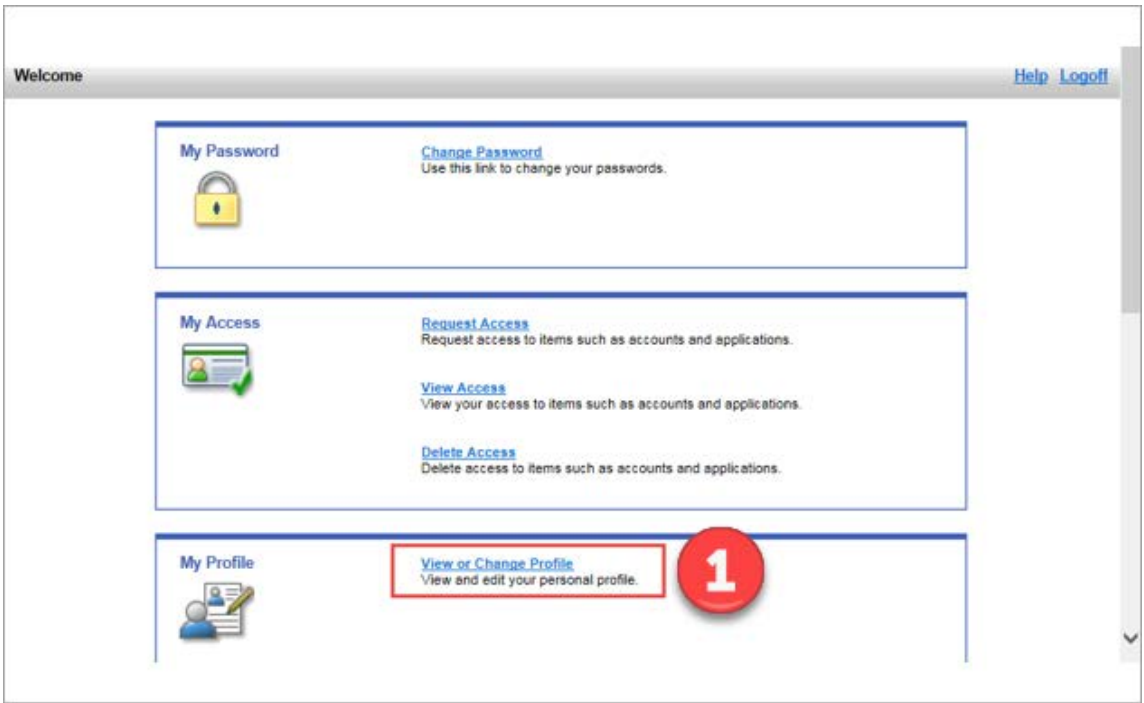
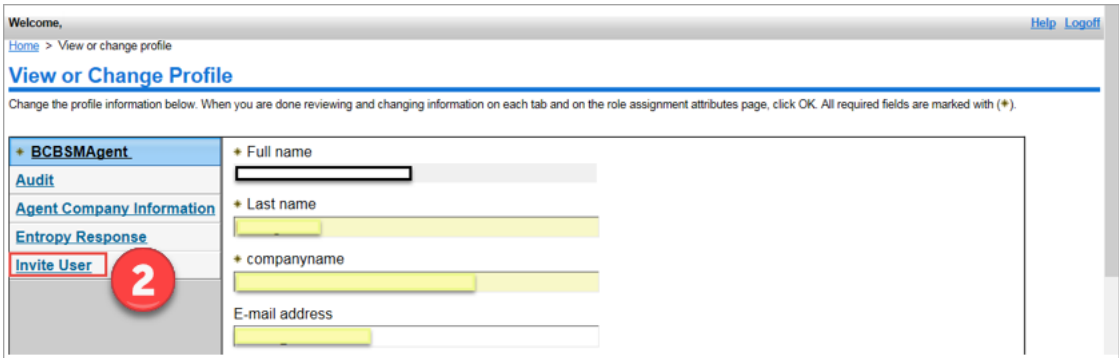


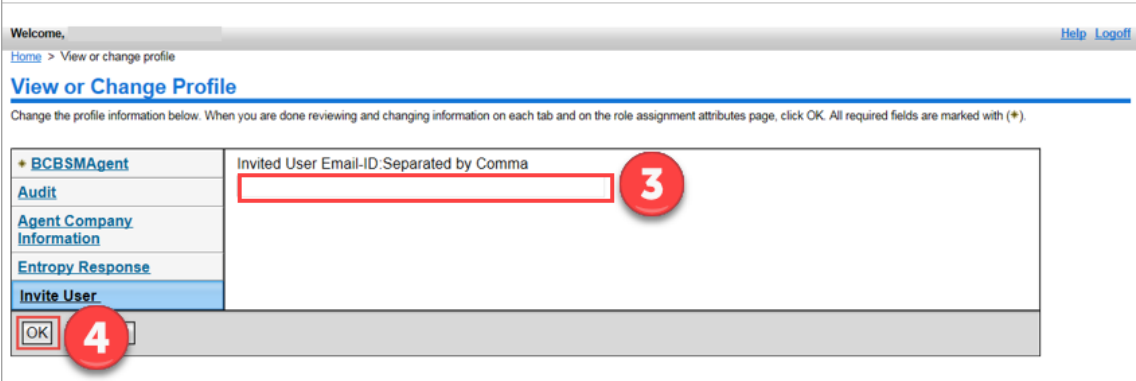
Task 4 Inviting New Users

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
1	<p>Click View or Change Profile.</p> 
2	<p>Click Invite User.</p> 
3	<p>Key the email address.</p> <p>Note: If you are typing more than one email, separate each of them with a comma.</p>

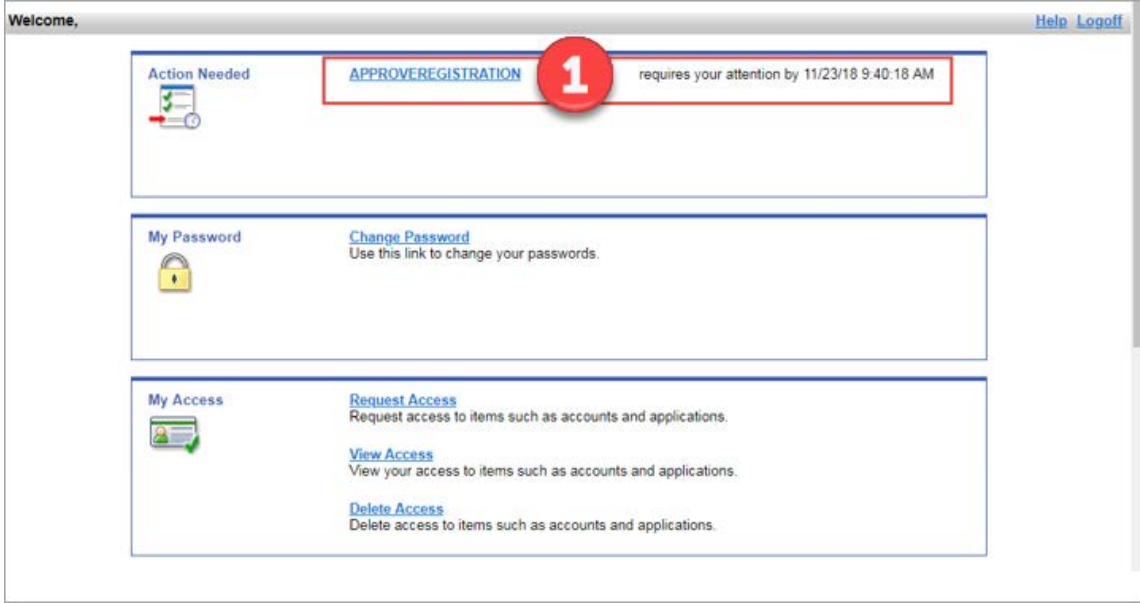
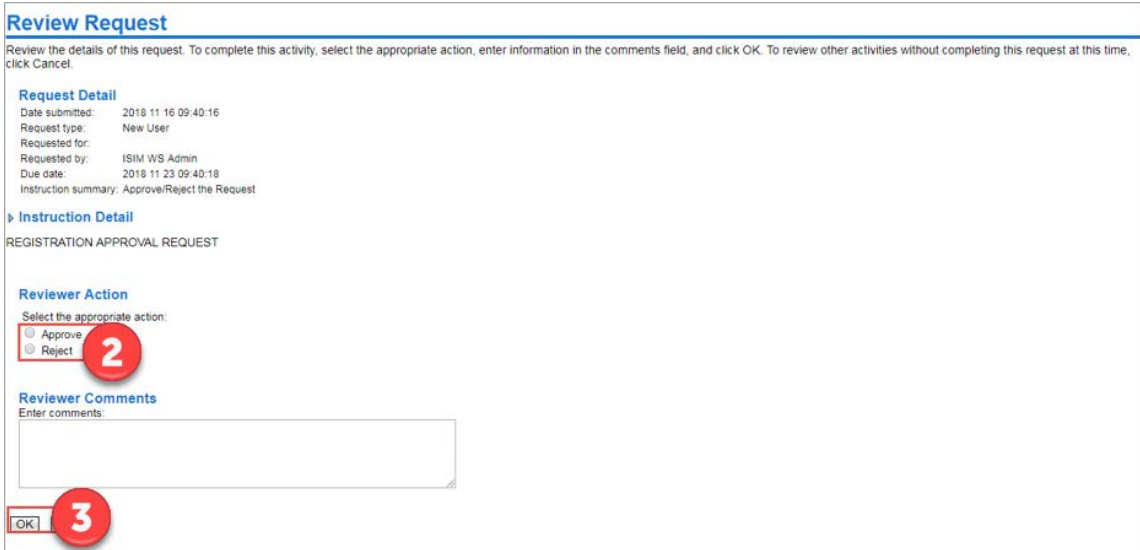
	 <p>Welcome, Help Logoff</p> <p>Home > View or change profile</p> <h3>View or Change Profile</h3> <p>Change the profile information below. When you are done reviewing and changing information on each tab and on the role assignment attributes page, click OK. All required fields are marked with (*).</p> <div><div><ul style="list-style-type: none">* BCBSMAgentAuditAgent Company InformationEntropy ResponseInvite User</div><div><p>Invited User Email-ID: Separated by Comma</p><input type="text"/></div></div> <div><input type="button" value="OK"/></div>
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.

Step	Action
1	<p>Click APPROVEREGISTRATION.</p> 
2	<p>Under Reviewer Action, Click Approve.</p> 

3	Click OK .
---	-------------------

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

Welcome, [Help](#) [Logout](#)

[Home](#) > [Approve and review requests](#) > Review request > Response submitted

Response Submitted: Approve

You have completed this activity, which will be removed from your list.

Request Detail

Date submitted: 2018 11 16 09:40:16
Request type: New User
Requested for:
Requested by: ISIM WS Admin
Action taken: Approve

Related Tasks

To review other activities, refer to the [Approve and Review Requests](#) page.

To perform other tasks go to the [IBM Security Identity Manager Home](#) page.

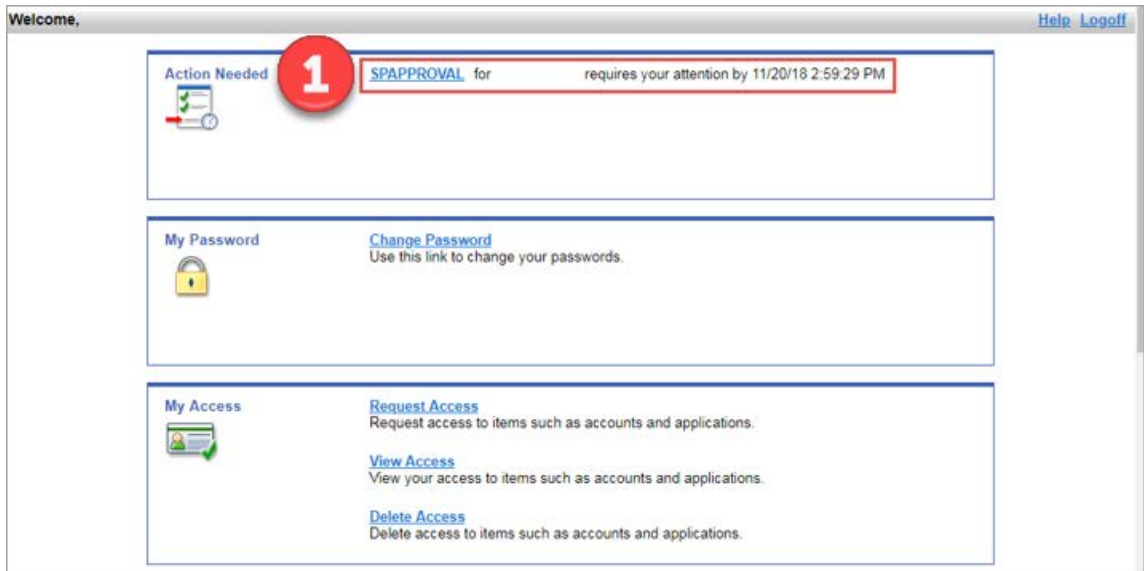
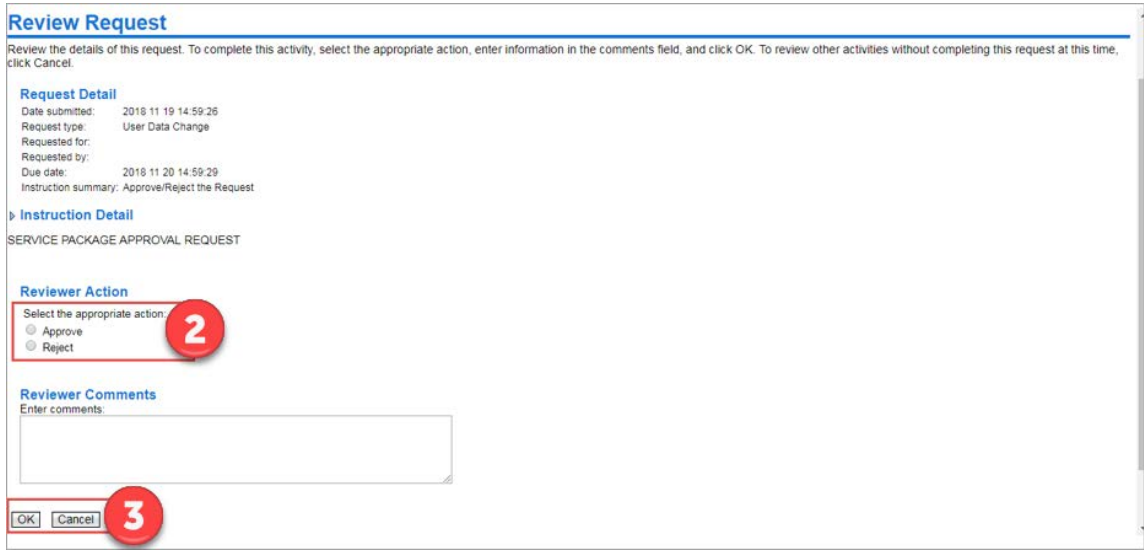
Web Support 1-800-258-3932, Hours of Operation: Monday through Friday, 8 a.m. to 8 p.m.
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Task 6 Approving an Access (Service) Request

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	<p>Click SPAPPROVAL.</p> 
2	<p>Under Reviewer Action, Click Approve.</p> 
3	<p>Click OK.</p>

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

[Home](#) > [Approve and review requests](#) > Review request > Response submitted

Response Submitted: Approve

You have completed this activity, which will be removed from your list.

Request Detail

Date submitted: 2018 11 19 14:59:26
Request type: User Data Change
Requested for:
Requested by:
Action taken: Approve

Related Tasks

To review other activities, refer to the [Approve and Review Requests](#) page.

To perform other tasks go to the [IBM Security Identity Manager Home](#) page.

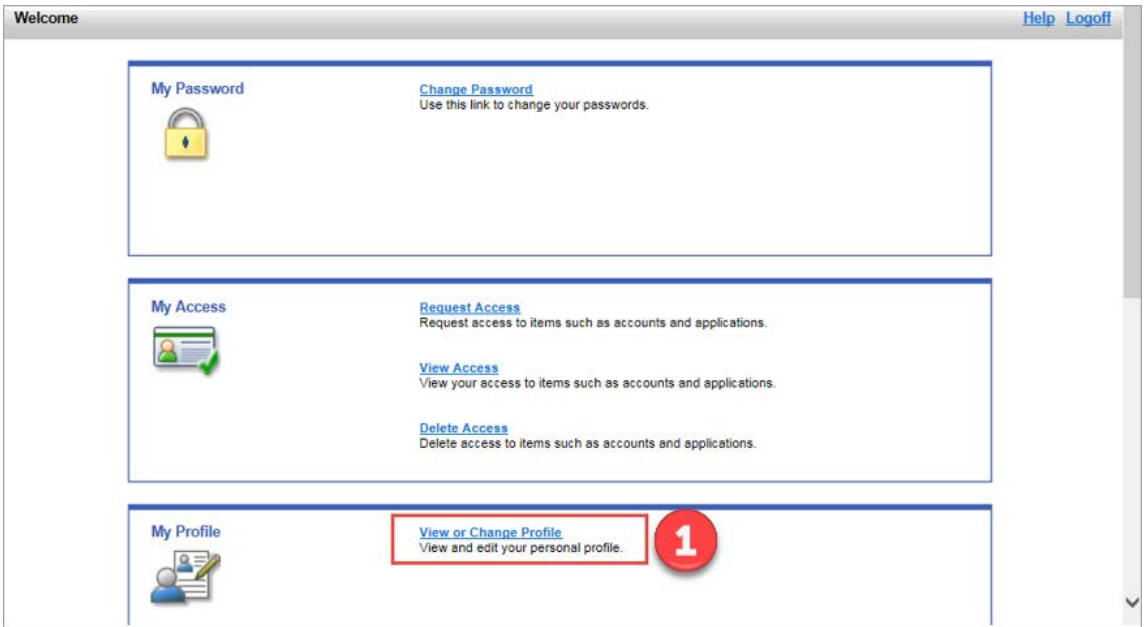
Web Support 1-800-258-3932, Hours of Operation: Monday through Friday, 8 a.m. to 8 p.m.
Find a Doctor | Privacy | Contact Us | Newsroom
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Task 7 Updating User Profile

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.

Step	Action						
1	<p>Click View or Change Profile.</p> 						
2	<p>You can update information under any of the tabs in the left navigation pane by clicking on the appropriate tab.</p> <p>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.</p> <table border="1"> <thead> <tr> <th>IF you want to update:</th><th>THEN:</th></tr> </thead> <tbody> <tr> <td>BCBSM Agent (or Group) tab</td><td>Go to step 3.</td></tr> <tr> <td>Agent (or Group) Company Information tab</td><td>Go to step 5.</td></tr> </tbody> </table>	IF you want to update:	THEN:	BCBSM Agent (or Group) tab	Go to step 3.	Agent (or Group) Company Information tab	Go to step 5.
IF you want to update:	THEN:						
BCBSM Agent (or Group) tab	Go to step 3.						
Agent (or Group) Company Information tab	Go to step 5.						

	<p>Entropy Responses</p> <p>Note: Entropy Responses refers to security questions and answers.</p>	<p>Go to step 7.</p>
	<p>Invite User</p>	<p>Go to step 9.</p>

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.

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

* Full name

* Last name

* companyname

E-mail address

Telephone number

pin

Agent Number

First name

Organizational roles

Agent Principal Admin

AgentSAMRole

AgentSIMRole

MCS View No Claims

* Preferred user ID

Search

Delete

OK

3

4

4

Click **OK**.

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

Home > View or change profile > Request submitted

Request Submitted: View or Change Profile

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

Request Detail

Request ID: 3288919495983338121

Date submitted: November 19, 2018 3:23:40 PM

Request type: View or Change Profile

Account/Access:

Information Updated

First name:

Last name:

companyname:

Related Tasks

To check on the status of your request, refer to the View My Requests page.

Go to View or Change Profile page.

To perform other tasks go to the IBM Security Identity Manager Home page.

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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.

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,

- * [BCBSMGroup](#)
- * [Group Company Information](#)
- [Audit](#)
- [Entropy Responses](#)
- [Invite User](#)

☒ Group Auto Update

Company Name

Group Company Address

Group Firm Type Classification
true

BCBSM Group Number
1

☐ Group hipaaphi

Group Registration Time

T&C Time

Group SponsorID

* Group FirmType
Group

Group ContractSize

Group-Group Name

Group CID

Mainframe BCBSM-ID

Mainframe-BCN-ID

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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.

	<p>Welcome, Help Logout</p> <p>Home > View or change profile</p> <h2>View or Change Profile</h2> <p>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.</p> <div> <div> + BCBSMGroup + Group Company Information Audit Entropy Responses Invite User </div> <div> <p>What is your mother's maiden name? test</p> <p>What is your father's middle name?</p> <p>What city were you born in?</p> <p>What is the first vehicle you drove? test</p> <p>What is your favorite food?</p> <p>What is your pet's name?</p> </div> </div> <p>OK 8</p> <p>Web Support 1-800-258-3932 Hours of Operation: Monday through Friday, 8 a.m. to 8 p.m. Find a Doctor Privacy Contact Us Newsroom ©1996-2015 BCBSM and BCN Nonprofit corporations and independent licensees of the Blue Cross and Blue Shield Association</p>
8	<p>Click OK.</p> <p>Note: A screen displays to confirm the profile change request has been submitted.</p> <div> <p>Welcome, Help Logout</p> <p>Home > View or change profile > Request submitted</p> <h2>Request Submitted: View or Change Profile</h2> <p>You have submitted a request. Below is the information available to you at this time.</p> <p>Request Detail</p> <p>Request ID: 1805624516658636650 Date submitted: January 4, 2019 2:19:46 PM Request type: View or Change Profile Account/Access:</p> <p>Information Updated</p> <p>bcbasm-agent-invitedemail:</p> <p>Related Tasks</p> <ul style="list-style-type: none"> To check on the status of your request, refer to the View My Requests page. Go to View or Change Profile page. To perform other tasks go to the IBM Security Identity Manager Home page. <p>Copyright IBM Corporation 1999-2012. All rights reserved.</p> </div>
9	<p>Welcome, Help Logout</p> <p>Home > View or change profile</p> <h2>View or Change Profile</h2> <p>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.</p> <div> <div> + BCBSMGroup + Group Company Information Audit Entropy Responses Invite User </div> <div> <p>Invited User Email-ID Separated by comma</p> </div> </div> <p>OK 10</p> <p>Web Support 1-800-258-3932 Hours of Operation: Monday through Friday, 8 a.m. to 8 p.m. Find a Doctor Privacy Contact Us Newsroom ©1996-2015 BCBSM and BCN Nonprofit corporations and independent licensees of the Blue Cross and Blue Shield Association</p>

10

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

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.

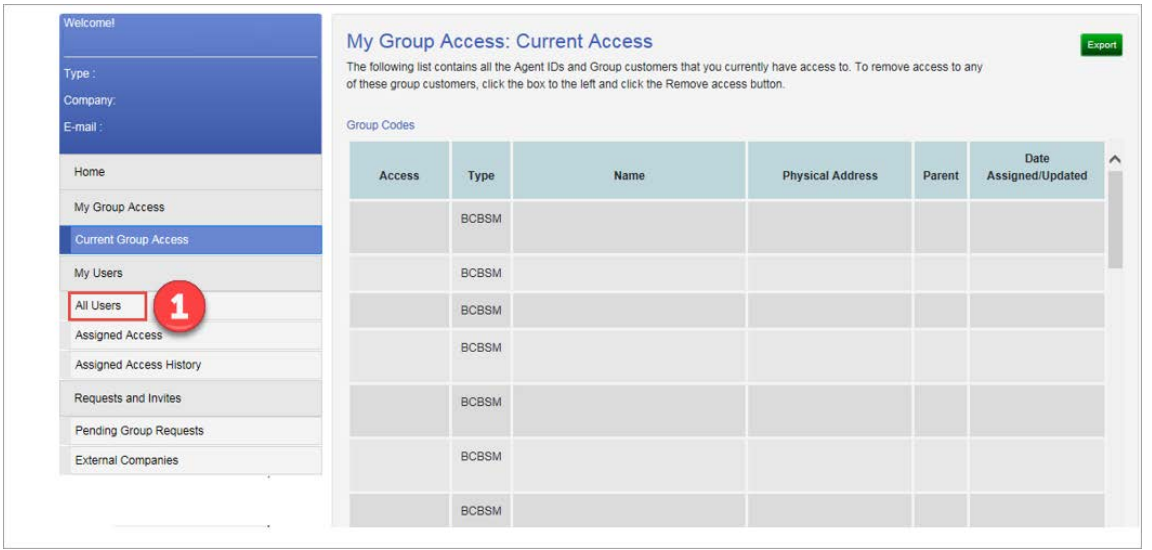
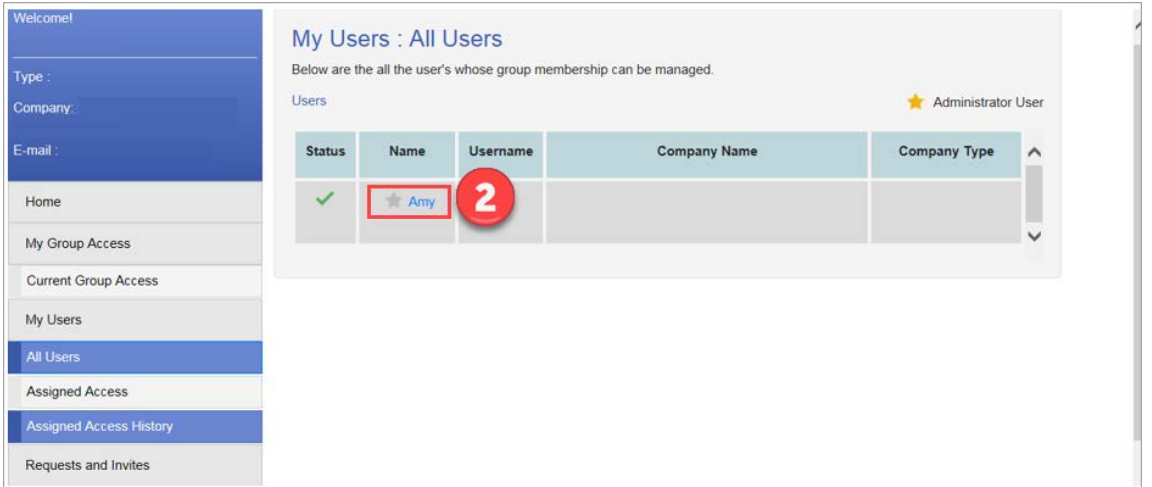


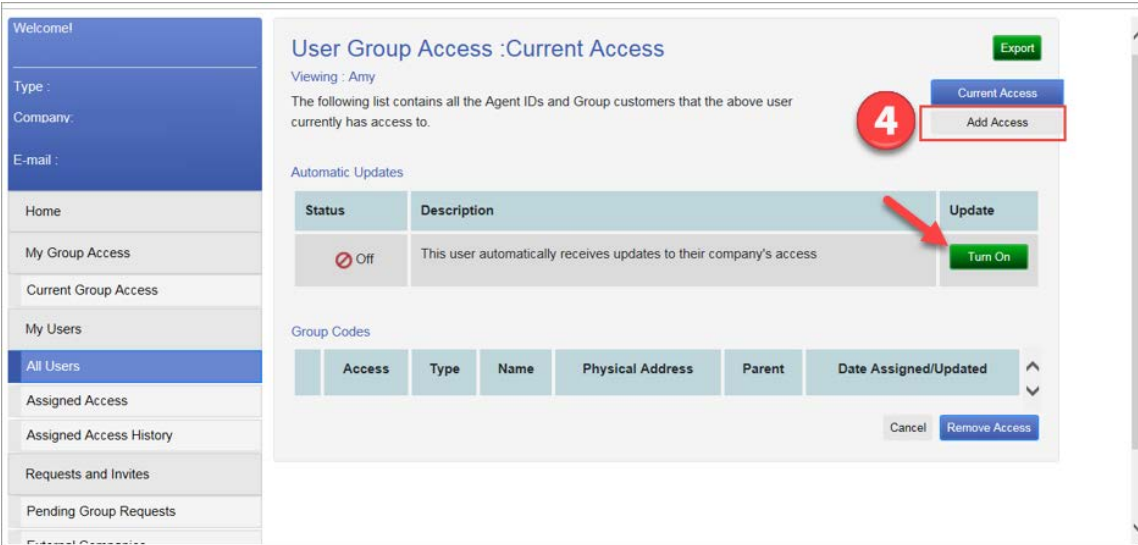
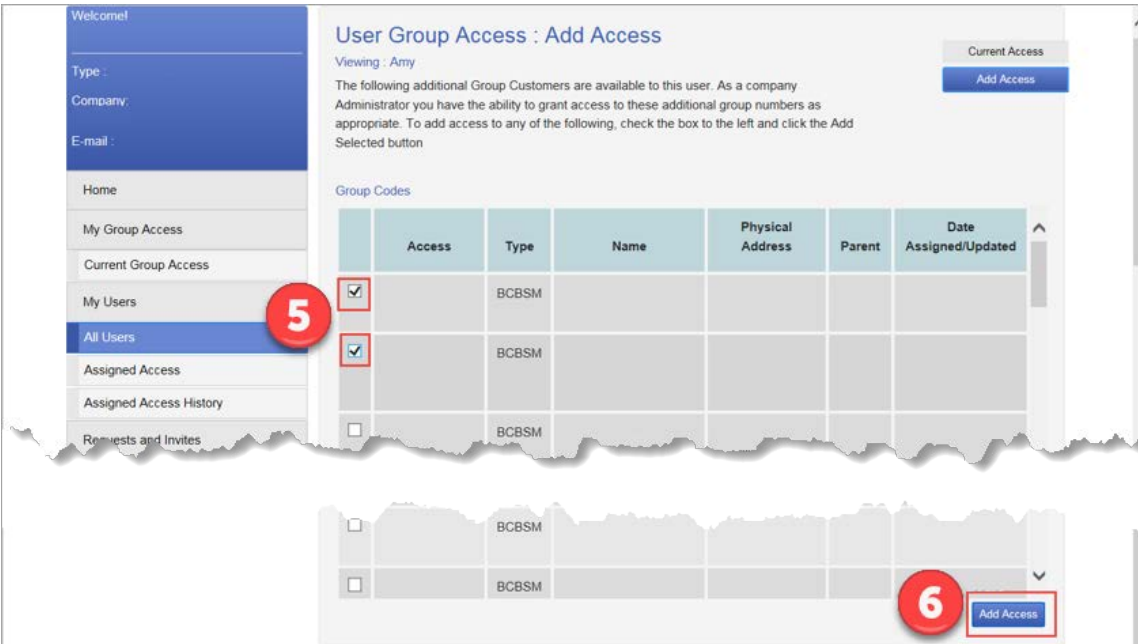
Task 8 Adding/Removing Group Codes

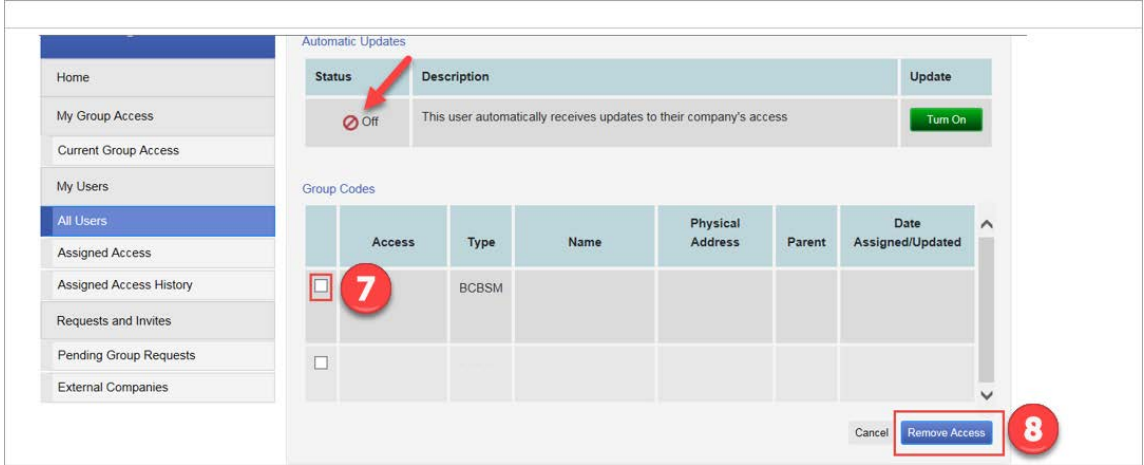
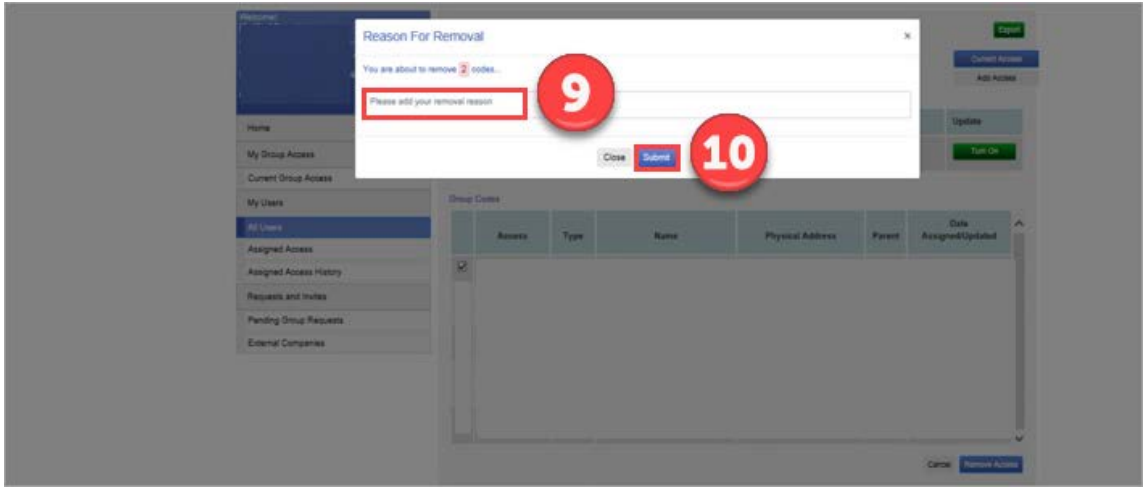
As an Administrator, you can add and/or remove group codes for a user.

- **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.

Step	Action
1	<p>Click All Users.</p> 
2	<p>Click user's Name.</p> 

3	<p>Note: The selected user's Current Access displays.</p> <table border="1"> <thead> <tr> <th>To</th><th>Then</th></tr> </thead> <tbody> <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> </tbody> </table>	To	Then	Add Group Codes	Go to step 4.	Remove Group Codes	Go to step 7.
To	Then						
Add Group Codes	Go to step 4.						
Remove Group Codes	Go to step 7.						
4	<p>Click Add Access.</p> <p>Note: If Turn On is selected for Automatic-Updates, access is granted to all Group Codes.</p> 						
5	<p>Click the checkbox(es) next to the group code(s) you want the user to access.</p> 						

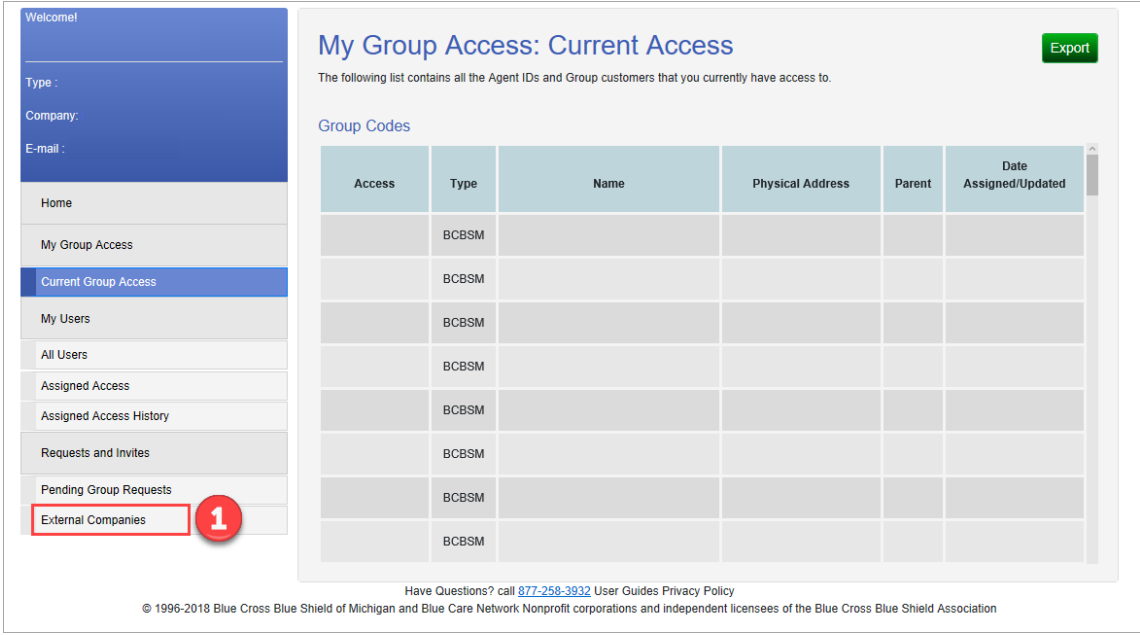
6	From the Current Access screen, click Add Access .
7	<p>Click the checkbox(es) next to the group code(s) to remove.</p> <p>Note: Automatic-Updates must be Off to remove Group Codes.</p> 
8	Click Remove Access .
9	<p>Type a reason for removal.</p> <p>Note: This is optional.</p> 
10	<p>Click Submit.</p> <p>Note: The codes are now removed.</p>

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						
1	<p>Click External Companies.</p> 						
2	<p>Note: The External Company Requests screen displays.</p> <table border="1"> <thead> <tr> <th>To</th><th>Then</th></tr> </thead> <tbody> <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> </tbody> </table>	To	Then	Request External Access	Go to step 3.	Approve External Access	Go to step 6.
To	Then						
Request External Access	Go to step 3.						
Approve External Access	Go to step 6.						
3	Click Request External Access .						

Requests: External Company Requests

The following external companies have requested access to group codes that your organization owns.

Access	Company	Requesting Administrator	Date Submitted
--------	---------	--------------------------	----------------

Reject Approve Access

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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.

Request External Group Access

To request access to a GroupID owned by another company, indicate the ID that you would like access to and click the Submit button. Your request will be forwarded to the company that owns that access. Once a decision has been made on your request, you will be notified using the e-mail address used in your profile.

Agent Number

BCBSM Group # XXXXXXXXXXXX

BCN Facets Group #

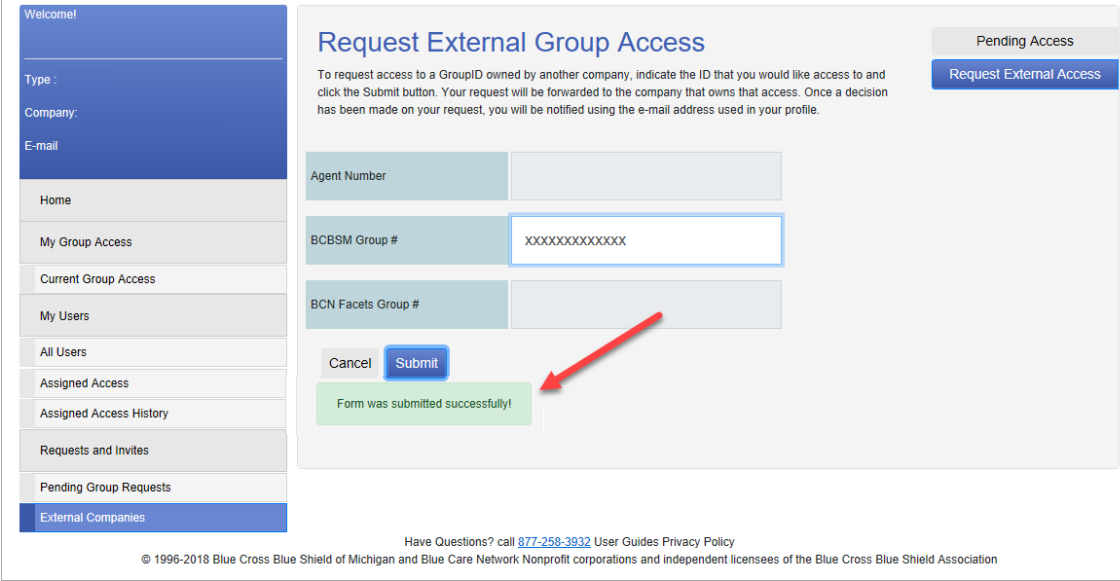
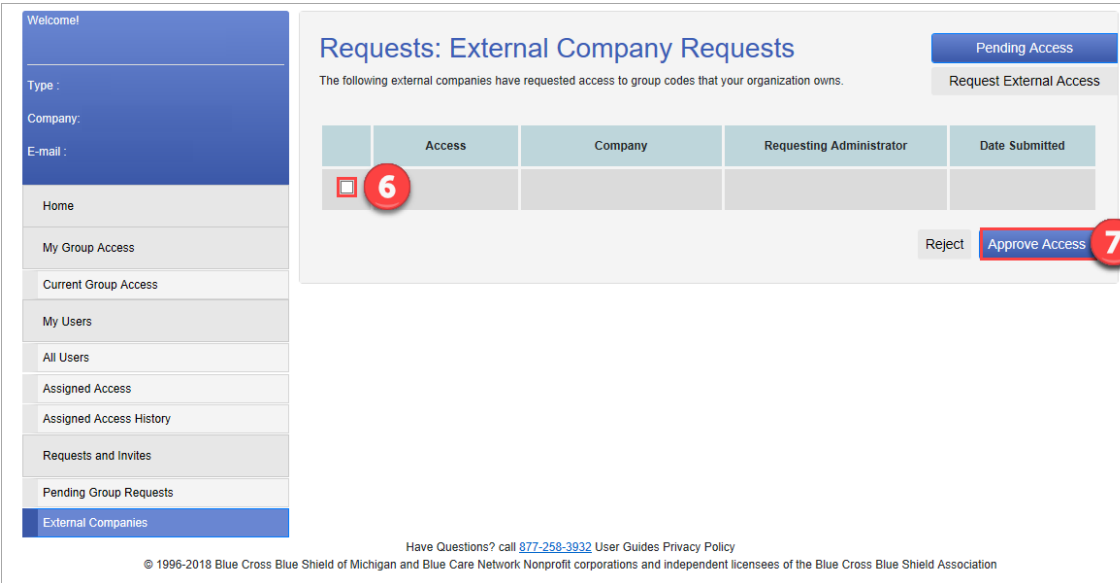
Cancel Submit

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5 Click **Submit**.

Note: The following screen displays to confirm the form was submitted successfully.

	 <p>Form was submitted successfully!</p>
6	<p>Click the checkbox(es) next to the request(s) to approve.</p> <p>Note: Alternatively, you can also reject the request by selecting Reject.</p> 
7	<p>Click Approve Access.</p> <p>Note: The following screen displays and the request no longer appears, meaning it has been approved.</p>

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.

Access

Company

Requesting Administrator

Date Submitted

Pending Access

Request External Access

Reject

Approve Access

Have Questions? call [877-258-3932](tel:877-258-3932) User Guides Privacy Policy

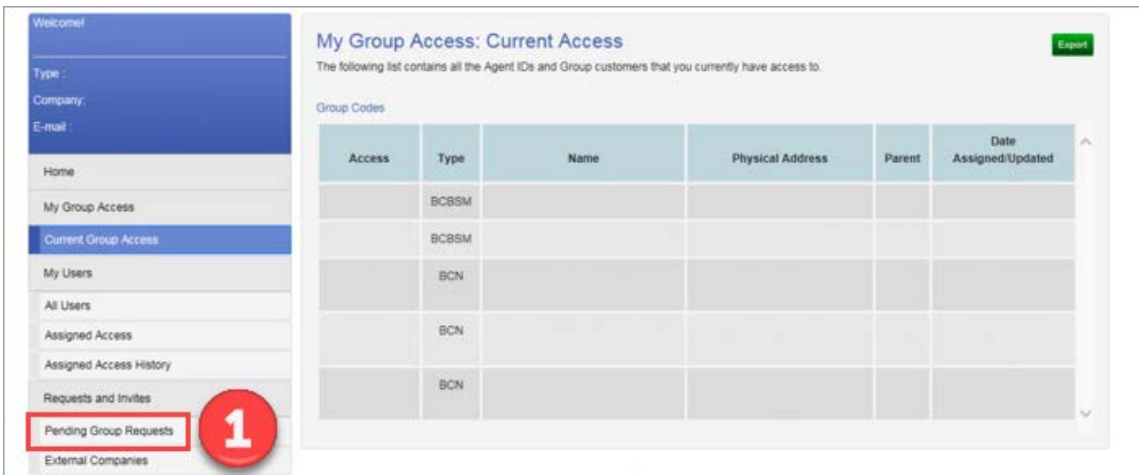
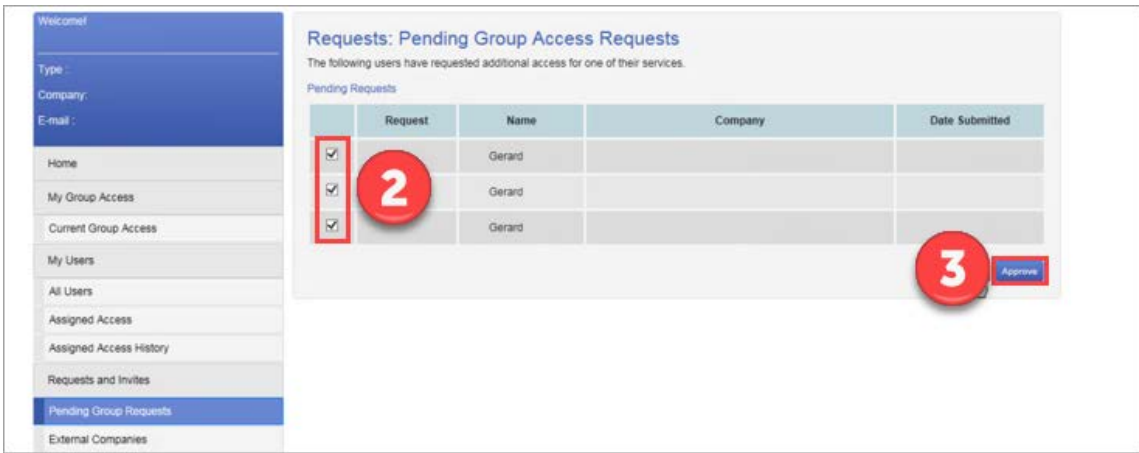
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Task 10 Approving Group Code Requests

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).

Step	Action
1	<p>Click Pending Group Requests.</p> 
2	<p>Click the checkbox(es) next to the Pending Requests you want to approve.</p> <p>Note: Alternatively, you can also reject the request by selecting Reject.</p> 
3	<p>Click Approve.</p>

The following screen displays that the pending requests are no longer listed and have 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: Pending Group Access Requests

The following users have requested additional access for one of their services.

Pending Requests

Request	Name	Company	Date Submitted
---------	------	---------	----------------

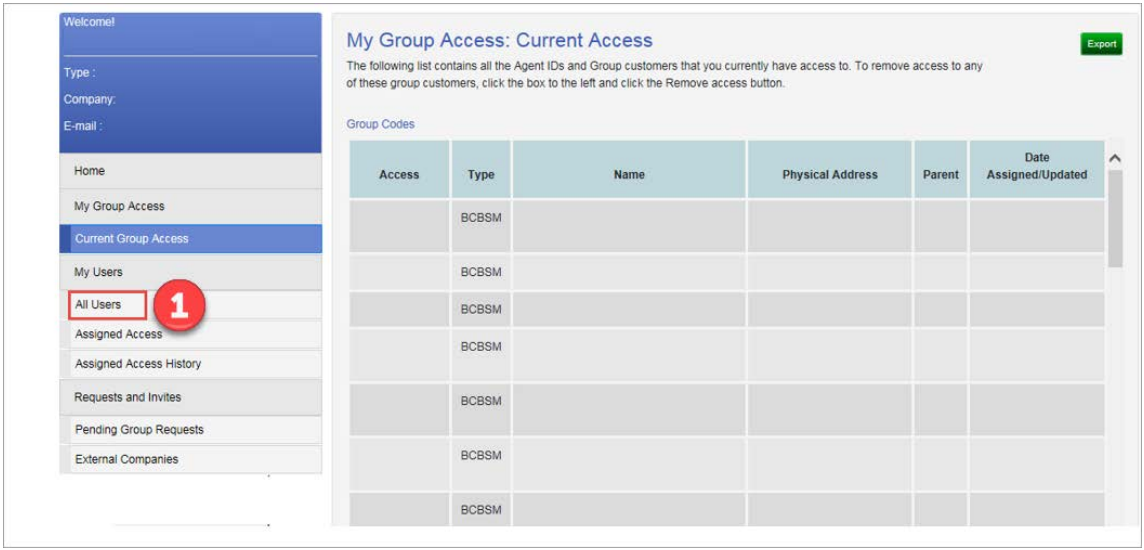
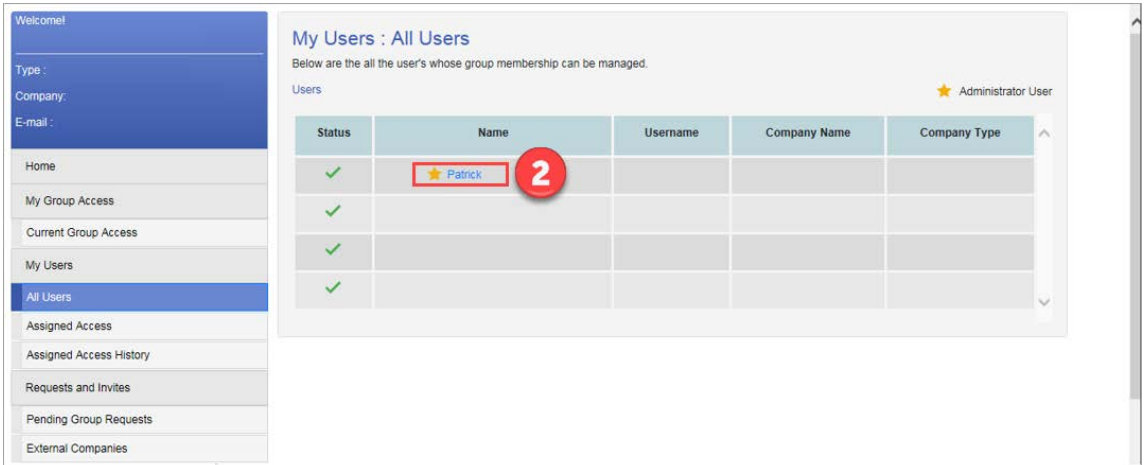
Reject Approve

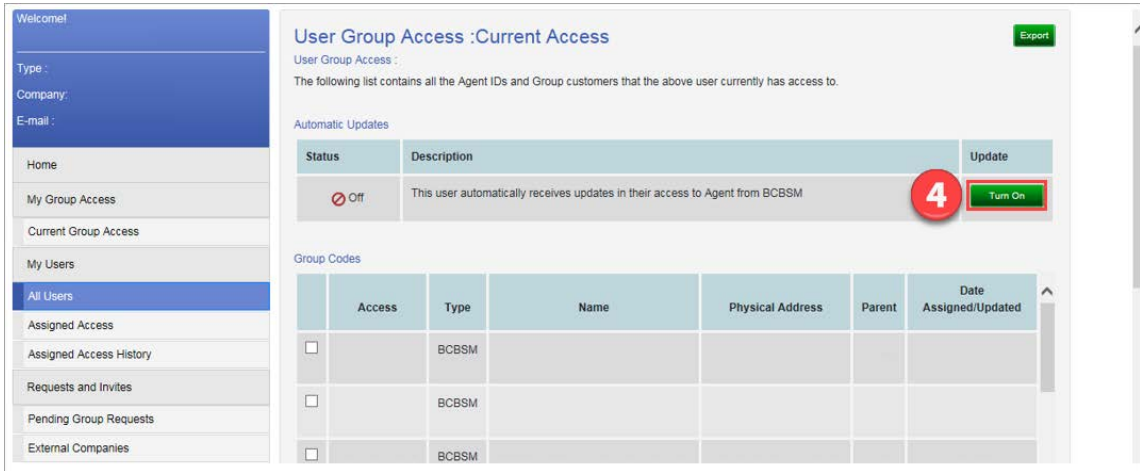
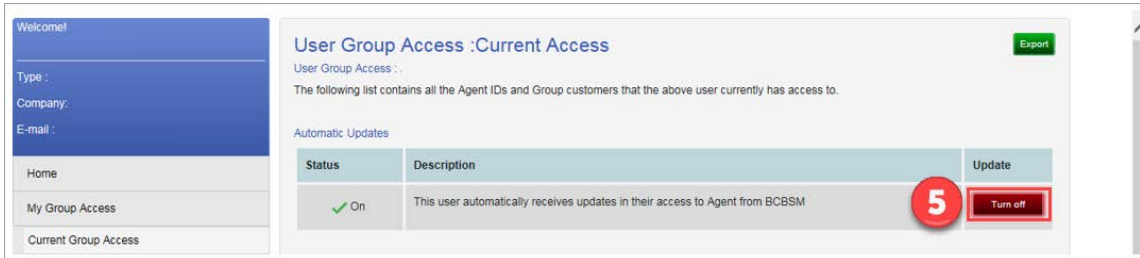
Task 11 Turning On/Off Automatic-Updates

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	<p>Click All Users.</p> 
2	<p>Click the user's Name.</p> <p>Note: A star next to the user's name indicates they are an Administrator.</p> 

3	<p>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.</p> <table border="1"> <thead> <tr> <th>To</th><th>Then</th></tr> </thead> <tbody> <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> </tbody> </table>	To	Then	Turn on Automatic-Updates	Go to step 4.	Turn off Automatic-Updates	Go to step 5.
To	Then						
Turn on Automatic-Updates	Go to step 4.						
Turn off Automatic-Updates	Go to step 5.						
4	<p>Click Turn On.</p>  <p>The screenshot shows the 'User Group Access :Current Access' page. On the left is a navigation menu with options like 'Home', 'My Group Access', 'Current Group Access', 'My Users', 'All Users', 'Assigned Access', 'Assigned Access History', 'Requests and Invites', 'Pending Group Requests', and 'External Companies'. The main content area has a header 'User Group Access :Current Access' with an 'Export' button. Below it, a section titled 'Automatic Updates' contains a table with columns 'Status', 'Description', and 'Update'. The status is 'Off' with a red circle and the number 4 highlighting the 'Turn On' button. Below this is a 'Group Codes' table with columns 'Access', 'Type', 'Name', 'Physical Address', 'Parent', and 'Date Assigned/Updated'.</p>						
5	<p>Click Turn Off.</p>  <p>The screenshot shows the 'User Group Access :Current Access' page. On the left is a navigation menu with options like 'Home', 'My Group Access', 'Current Group Access', 'My Users', 'All Users', 'Assigned Access', 'Assigned Access History', 'Requests and Invites', 'Pending Group Requests', and 'External Companies'. The main content area has a header 'User Group Access :Current Access' with an 'Export' button. Below it, a section titled 'Automatic Updates' contains a table with columns 'Status', 'Description', and 'Update'. The status is 'On' with a green checkmark. A red circle with the number 5 highlights the 'Turn Off' button. Below this is a 'Group Codes' table with columns 'Access', 'Type', 'Name', 'Physical Address', 'Parent', and 'Date Assigned/Updated'.</p>						

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.

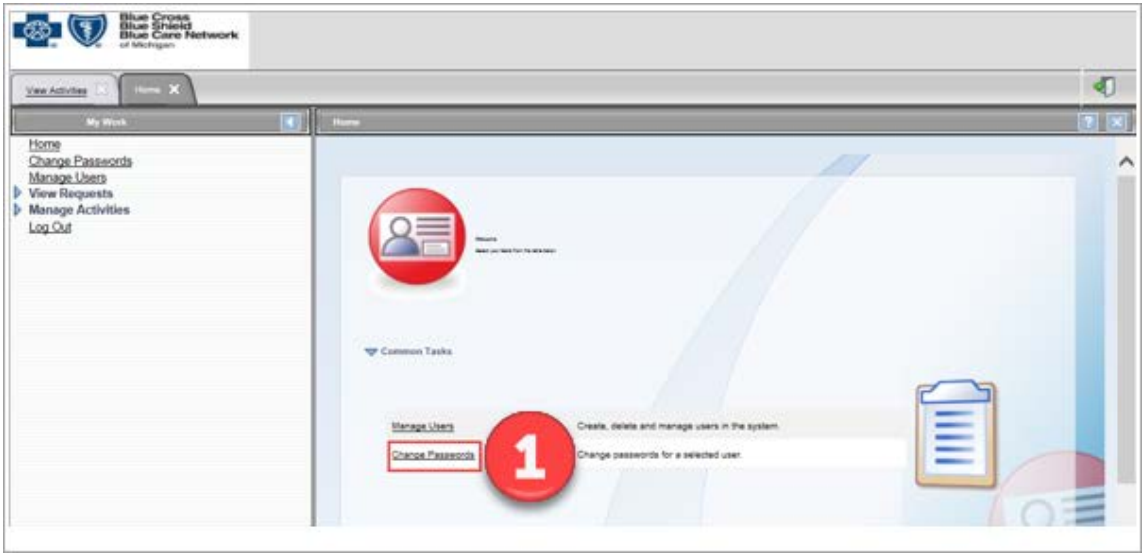



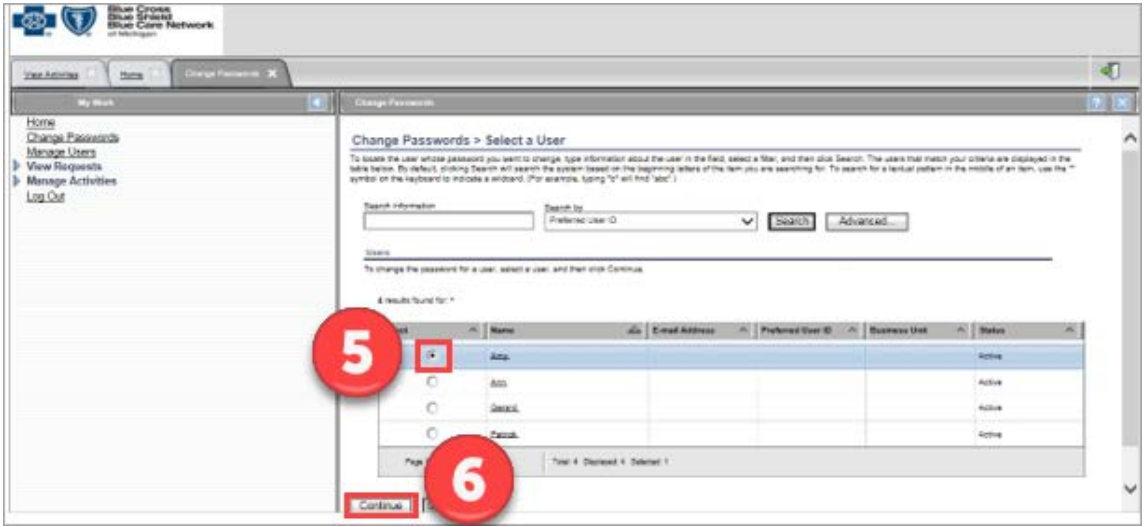

Task 12 Changing/Resetting User Passwords

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	<p>Click the Change Passwords link.</p> 
2	<p>Type the user's information in the Search field.</p> <p>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.</p> 
3	<p>Click Search by drop-down arrow to select the proper filter.</p>

4	<p>Click Search.</p> <p>Note: Any users matching the search criteria you selected are displayed.</p>
5	<p>Click the radio button next to the user whose password you want to change.</p> 
6	<p>Click Continue.</p>
7	<p>Type the same new password in the in the Password and Confirm Password fields.</p> 
8	<p>Click Submit.</p>
9	<p>Click Close.</p> <p>Note: The home screen of User Administration is displayed.</p>

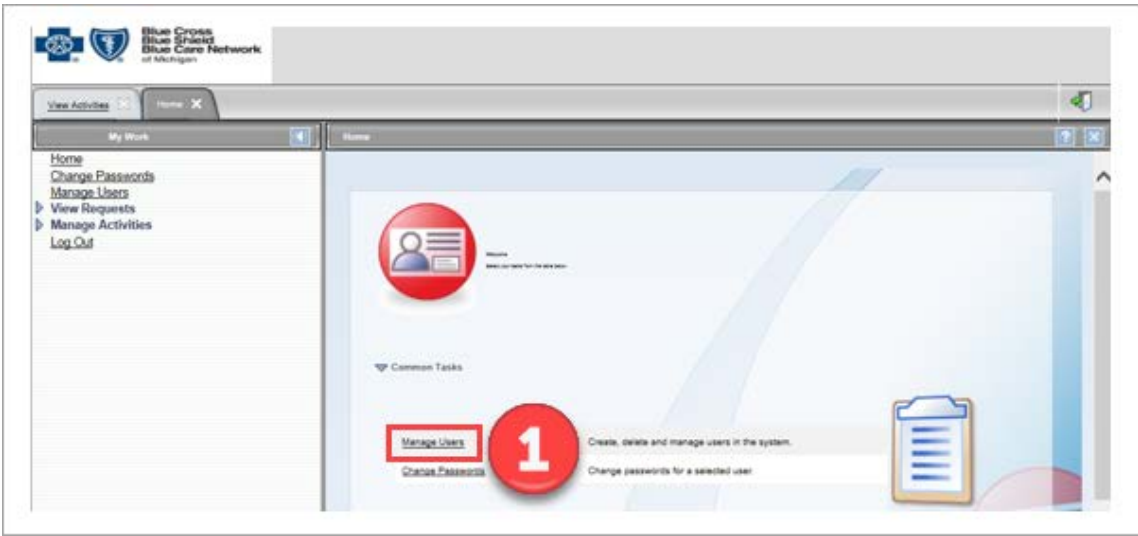


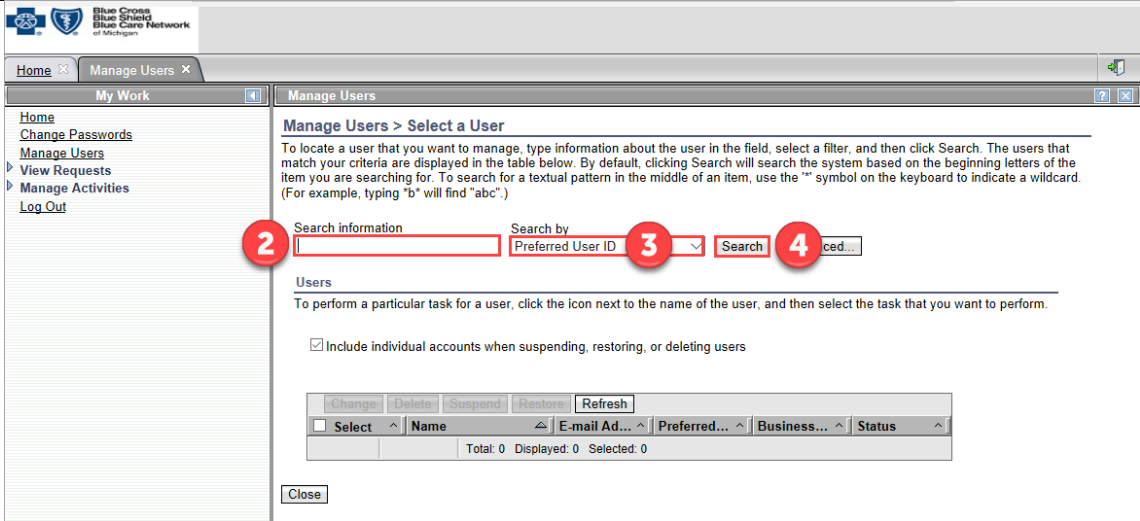
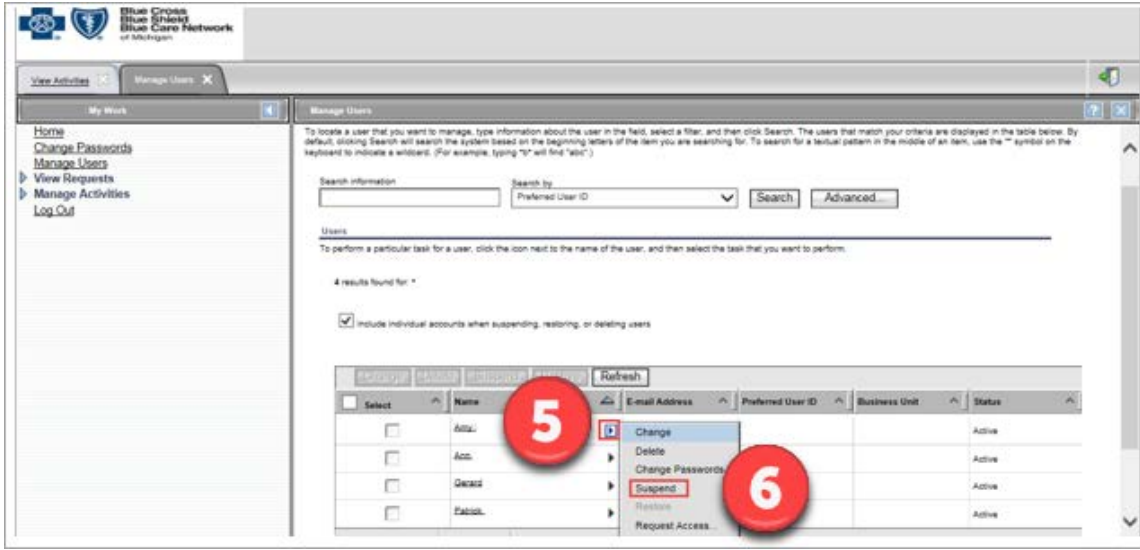
Task 13 Suspending/Locking a User Account

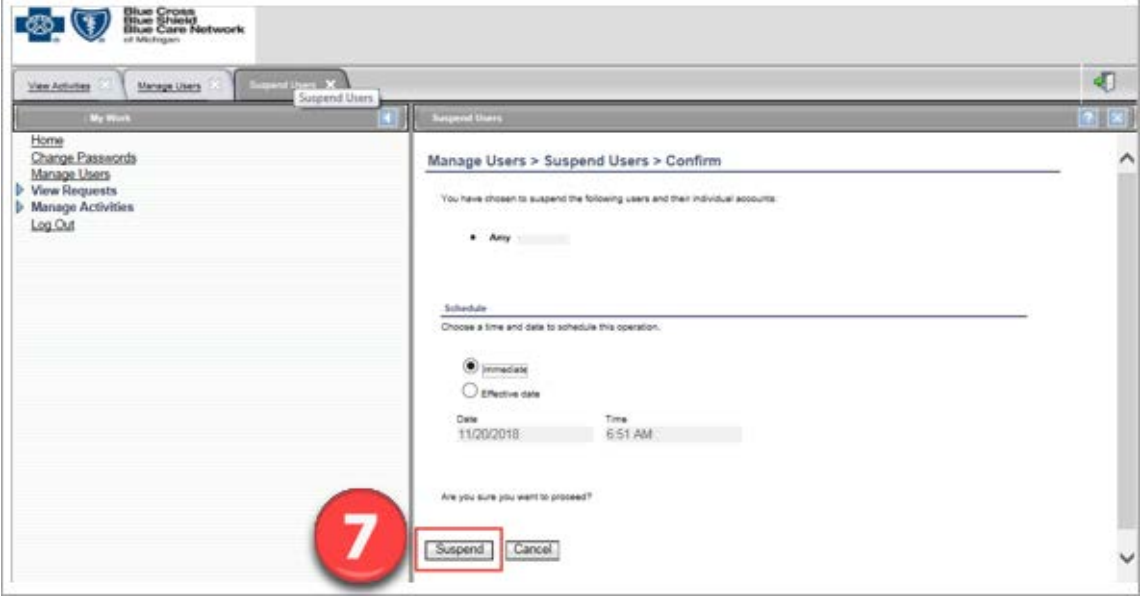

Occasionally it may become necessary to suspend (lock) a user account, for example, if they are out on leave or have been terminated. In this system, the user no longer needs to be suspended before being terminated.

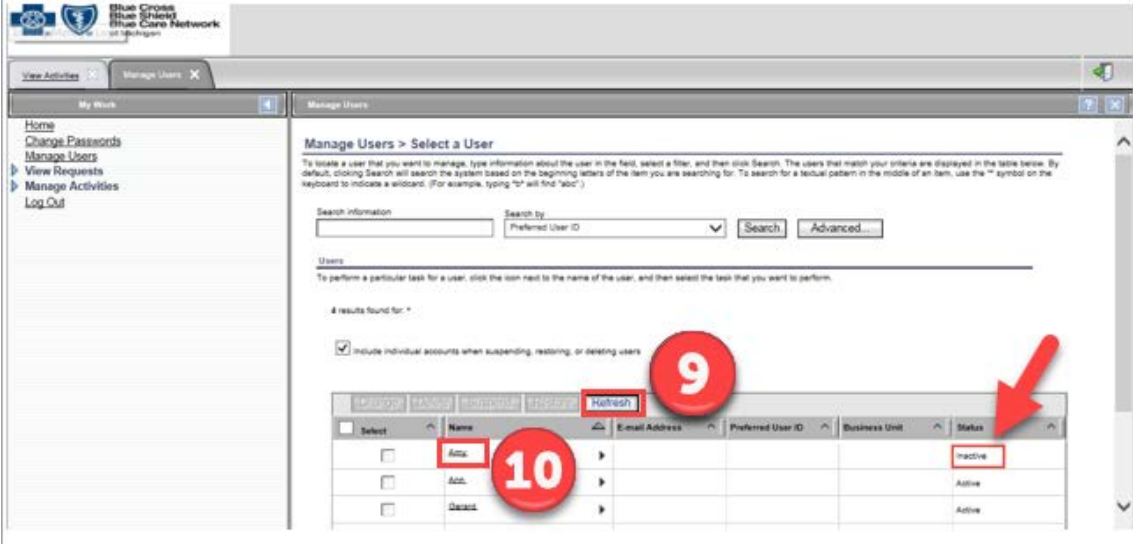
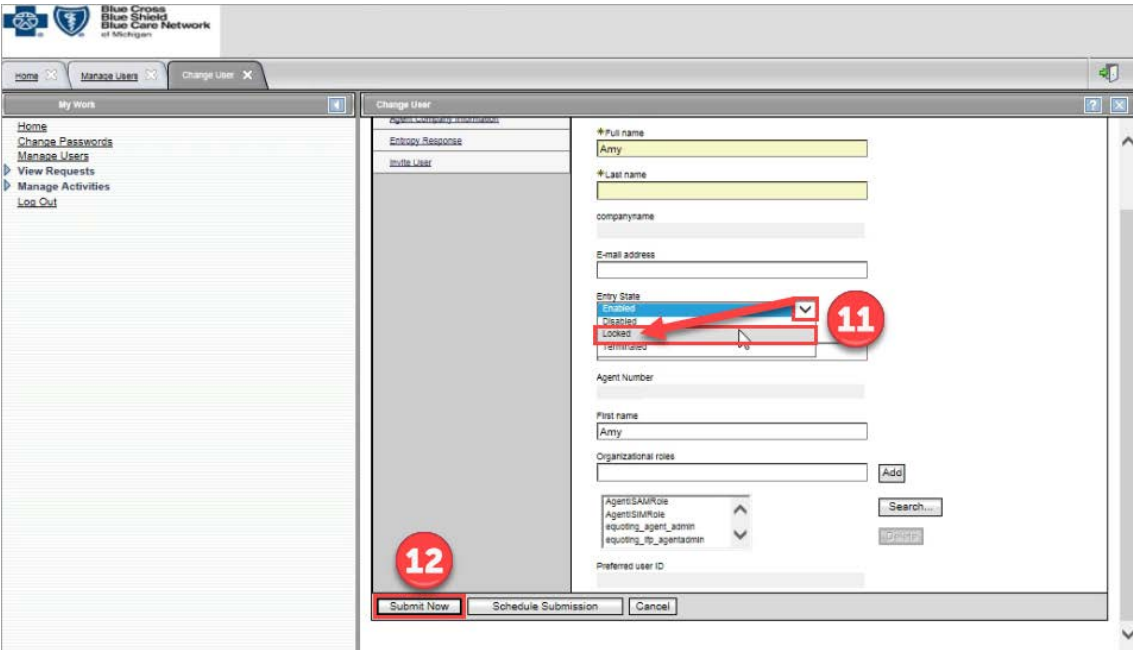
- **Note:** This task assumes you are successfully logged in and have selected **User Administration**. All fields marked with an asterisk (*) are required.

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

Step	Action
1	<p>Click Manage Users.</p> 
2	<p>Type the user's information in the Search field.</p> <p>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.</p>

	
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.

	
8	<p>Click Close.</p> <p>Note: This closes the Suspend Users tab and returns to Manage Users tab.</p> 
9	<p>Click Refresh.</p> <p>Note: The user status displays Inactive.</p>

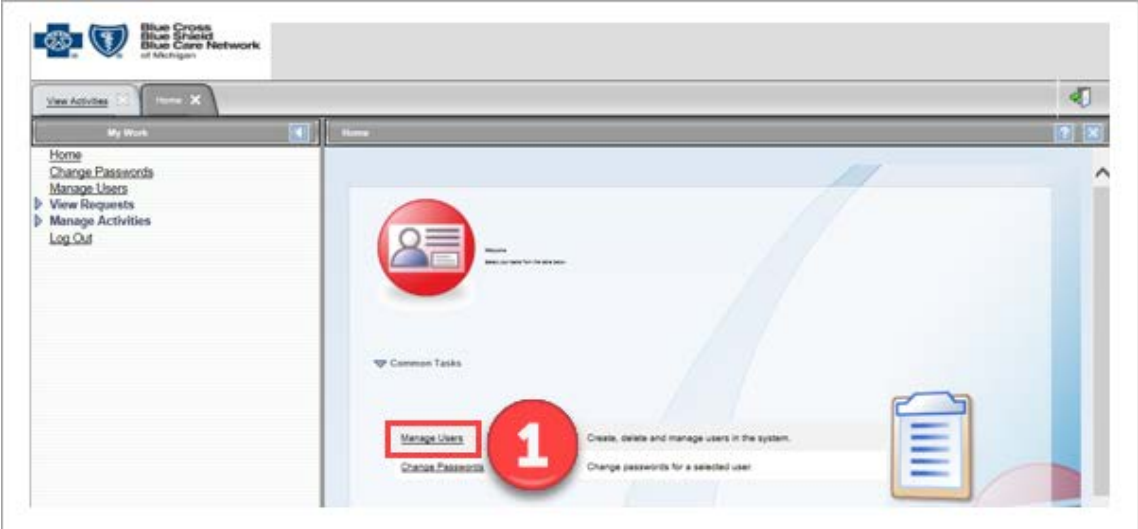
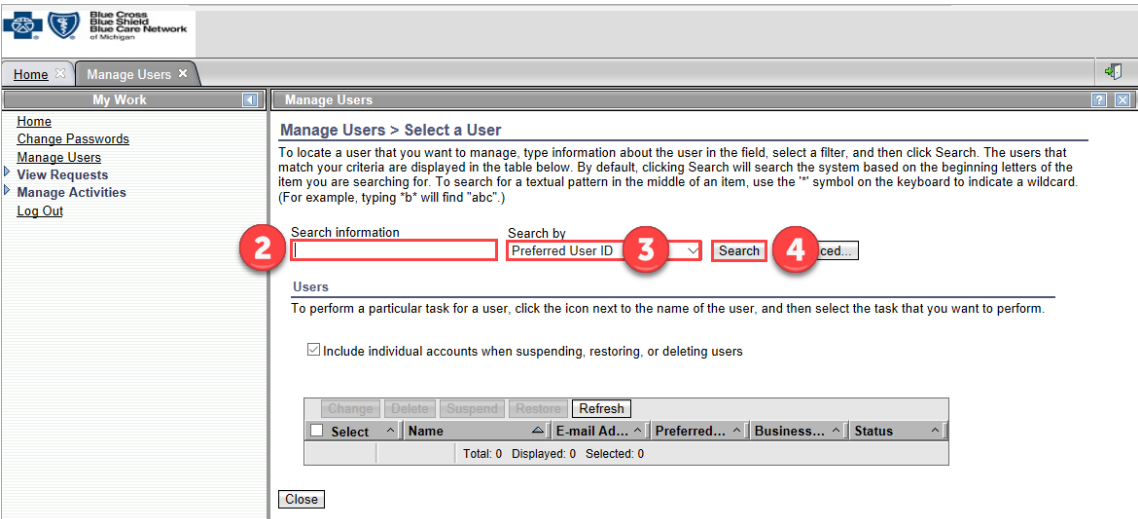
	
10	Click the name of the appropriate user.
11	<p>Click the Entry State drop-down arrow and select Locked.</p> 
12	Click Submit Now .

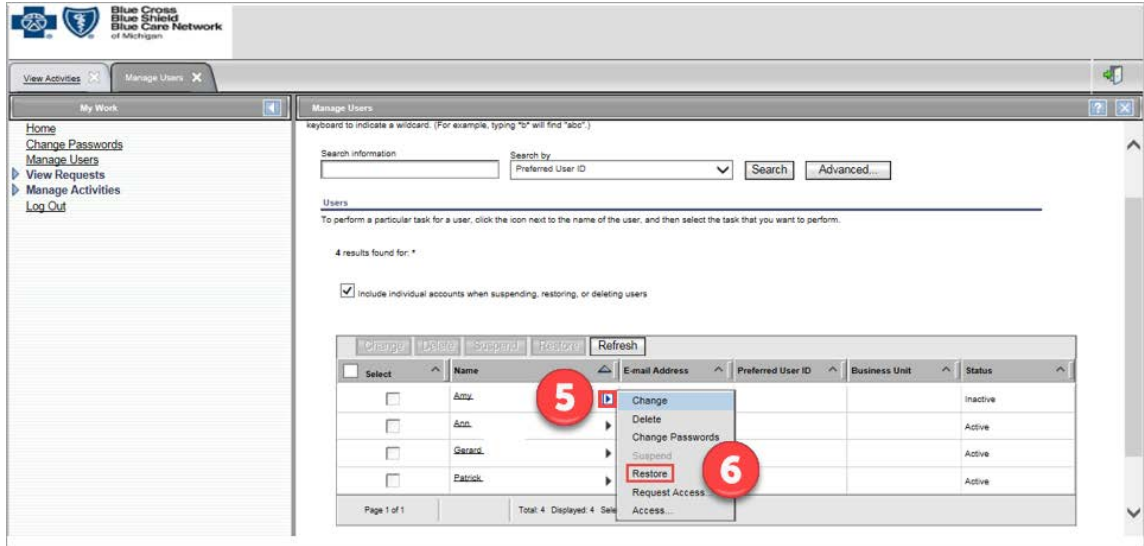
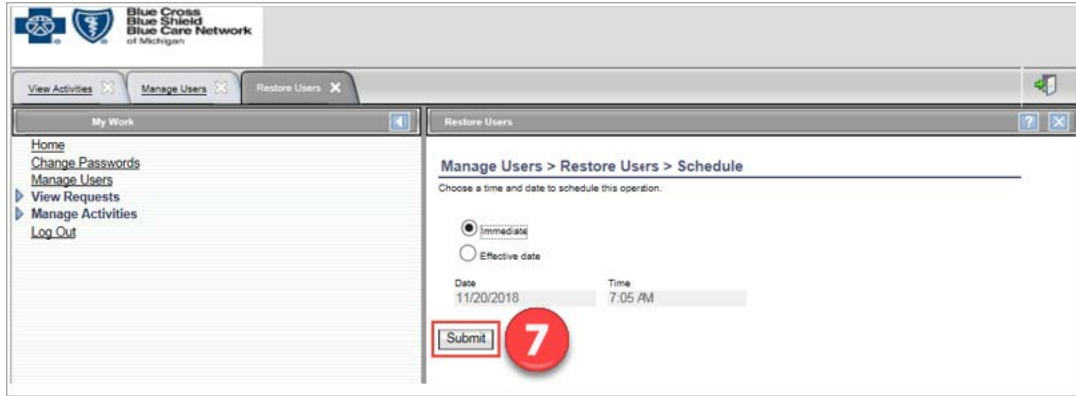
Task 14 Restoring/Activating a Suspended/Locked Account

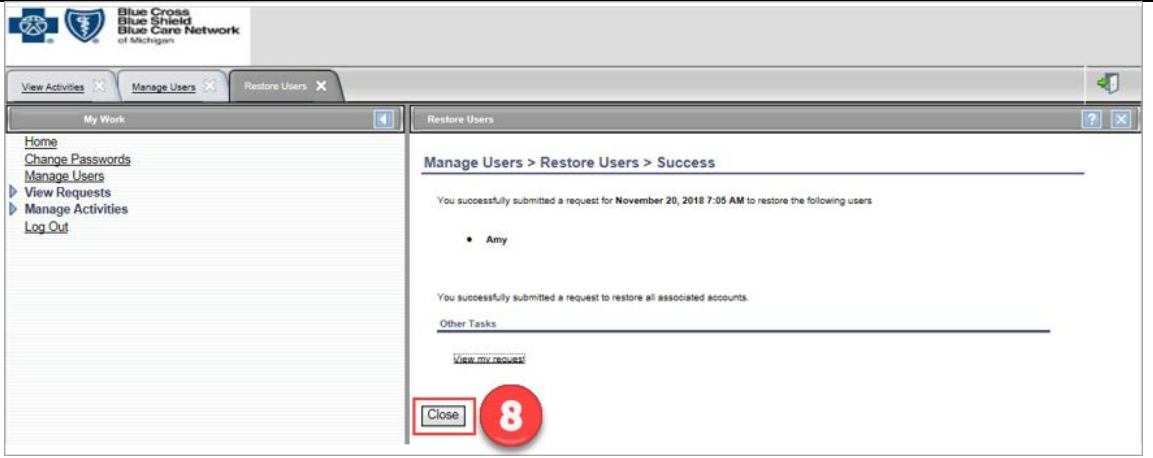
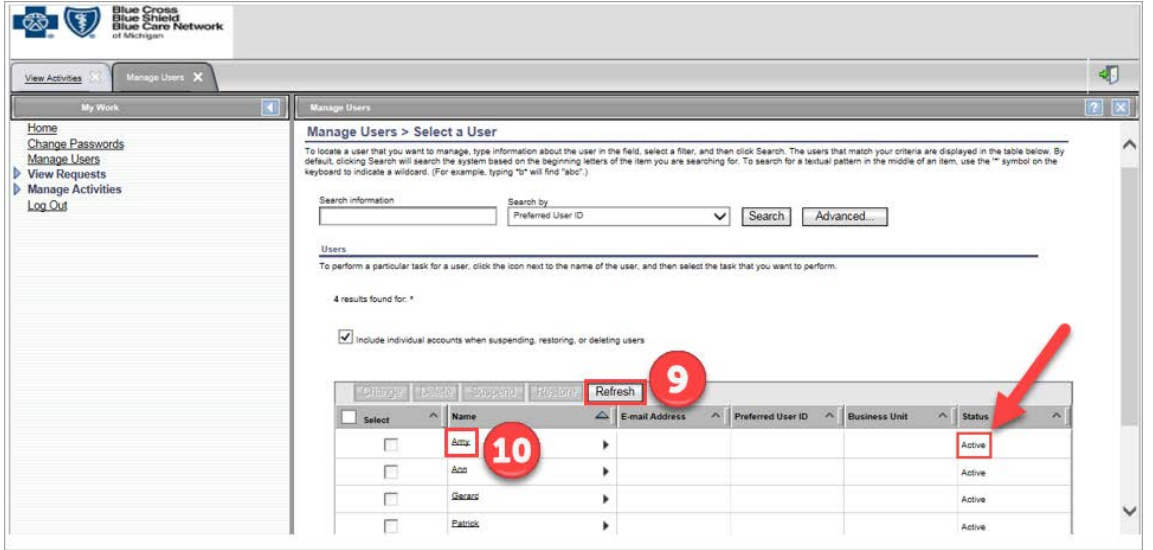
It may be necessary to restore (activate) a user account, for example, if the user was out on leave.

- **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.

Step	Action
1	<p>Click the Manage Users link.</p> 
2	<p>Type the user's information in the Search field.</p> <p>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.</p> 

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

Blue Cross Blue Shield of Michigan

Home Manage Users Change User

My Work

Home
Change Passwords
Manage Users
View Requests
Manage Activities
Log Out

Change User

BCBSMGroup

Group/Company Information
Audit
Entropy Responses
Invite User

Manage Users > Change User > BCBSMGroup

Type the appropriate information for the user. When you are done specifying information on each of the tabs, schedule the request.

*First name
Ame

*Last name

Common Entitlement
Enabled
Disabled
Locked
Terminated

First name

E-mail address

Preferred user ID

Organizational roles

Add

Search...

Drop

Telephone number

Submit Now Schedule Submission Cancel

12

11

12

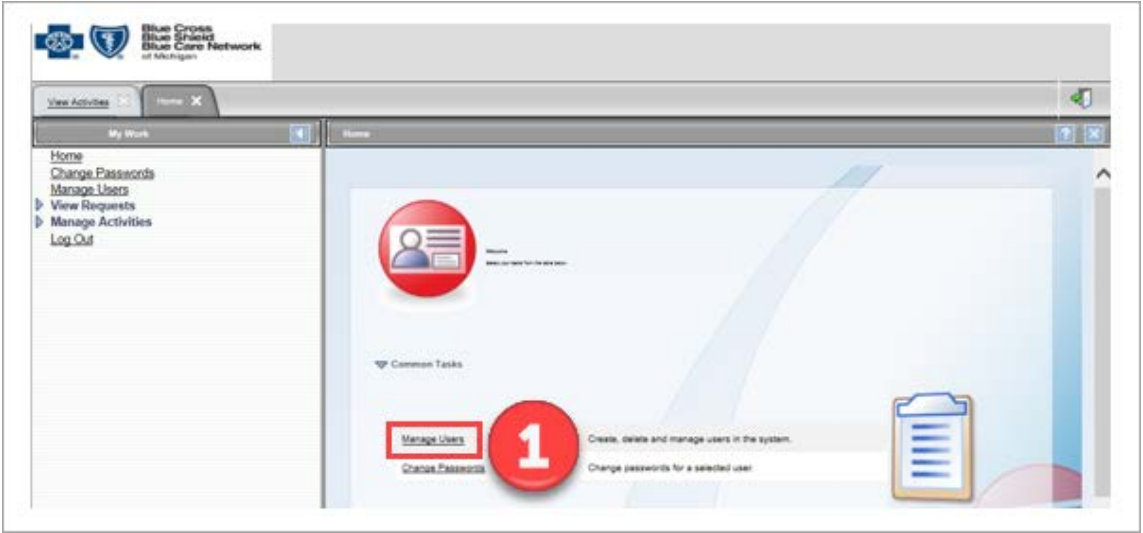
Click **Submit Now**.

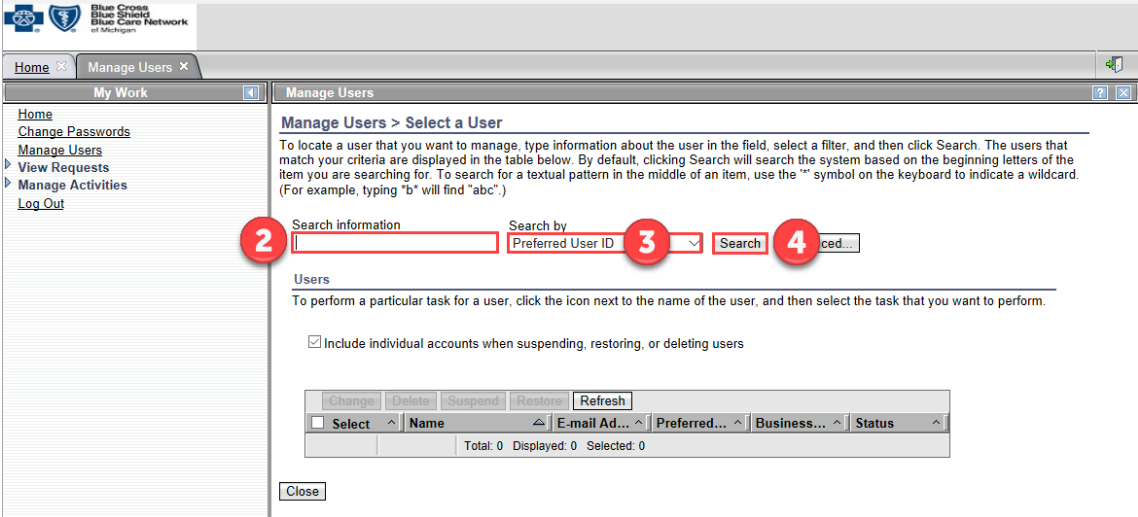
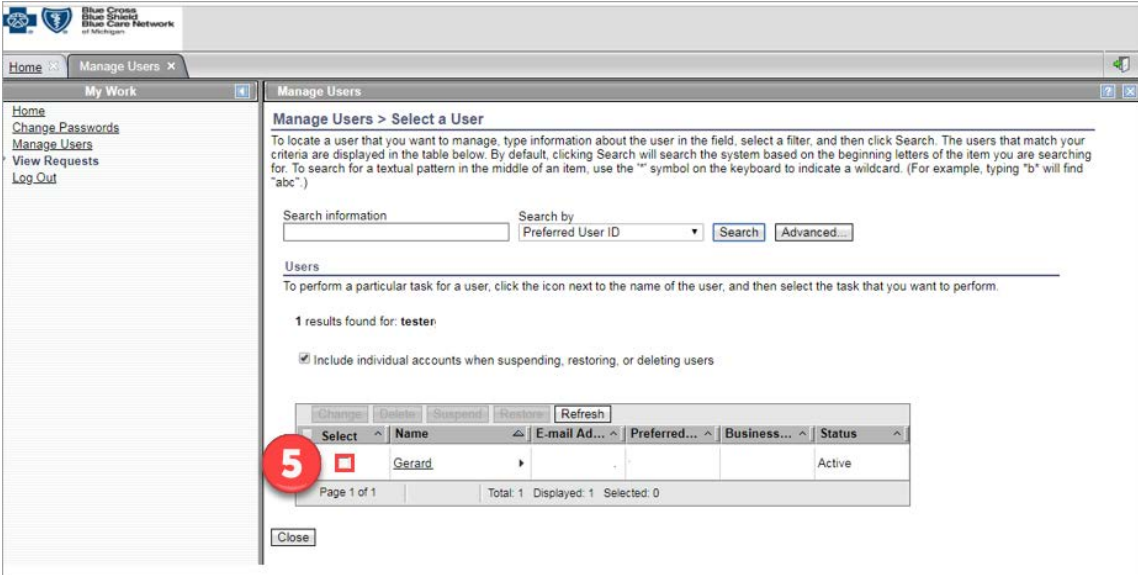
Task 15 Deleting/Terminating a User's Account

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	<p>Click Manage Users.</p> 
2	<p>Type the user's information in the Search field.</p> <p>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.</p>

	
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 .

Manage Users > Select a User

To locate a user that you want to manage, type information about the user in the field, select a filter, and then click Search. The users that match your criteria are displayed in the table below. By default, clicking Search will search the system based on the beginning letters of the item you are searching for. To search for a textual pattern in the middle of an item, use the "*" symbol on the keyboard to indicate a wildcard. (For example, typing "b*" will find "abc".)

Search information: Search by:

Users

To perform a particular task for a user, click the icon next to the name of the user, and then select the task that you want to perform.

1 results found for: **testerghs**

☒ Include in counts when suspending, restoring, or deleting users

Select	Name	E-mail Ad...	Preferred...	Business...	Status
<input checked="" type="checkbox"/>	Gerard				Active

Page 1 of 1 Total: 1 Displayed: 1 Selected: 1

7 Click **Delete** to confirm.

Manage Users > Delete Users > Confirm

You have chosen to delete the following users and their individual accounts:

- Gerard

Non-individual accounts will be orphaned.

Schedule

Choose a time and date to schedule this operation.

☒ Immediate
☐ Effective date

Date: 11/20/2018 Time: 10:52 AM

Are you sure you want to proceed?

8 Click **Close**.

Note: This closes the Delete Users tab and returns to Manage Users tab.

Manage Users > Delete Users > Success

You successfully submitted a request for **November 20, 2018 10:54 AM** to delete the following users

- Gerard

You successfully submitted a request to delete all associated accounts.

Other Tasks

[View my request](#)

9

Click the user's name link.

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

The screenshot shows the 'Manage Users' interface. On the left is a navigation menu with links: Home, Change Passwords, Manage Users, View Requests, Manage Activities, and Log Out. The main content area is titled 'Manage Users > Select a User'. It includes a search section with a text input, a 'Search by' dropdown set to 'Preferred User ID', and 'Search' and 'Advanced...' buttons. Below this is a table of users. The table has columns: Select, Name, E-mail Ad..., Preferred..., Business..., and Status. One user is listed: 'Gerard' with status 'Inactive'. A red circle with the number '9' is around the 'Gerard' name, and a red arrow points to the 'Inactive' status. Above the table are buttons: Change, Delete, Suspend, Restore, and Refresh. Below the table is a 'Close' button. The status bar at the bottom says 'Page 1 of 1', 'Total: 1', 'Displayed: 1', and 'Selected: 0'.

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

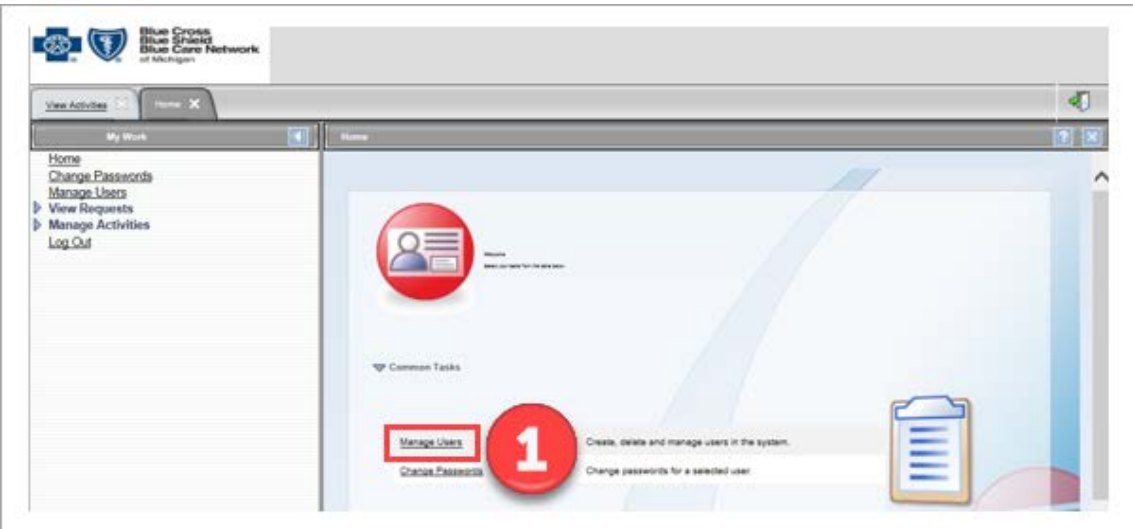
The screenshot shows the 'Change User' interface. On the left is a navigation menu with links: Home, Change Passwords, Manage Users, View Requests, Manage Activities, and Log Out. The main content area is titled 'Change User'. It contains several form fields: Last 4 Digit SSN, First name, E-mail address, Preferred user ID, Organizational roles (with an 'Add' button), Group/SAMRole, Group/SIMRole, and Telephone number. There are 'Search...' and 'Delete' buttons on the right. At the bottom are 'Submit Now', 'Schedule Submission', and 'Cancel' buttons. A red arrow points to the 'Is User Terminated' checkbox, which is checked.

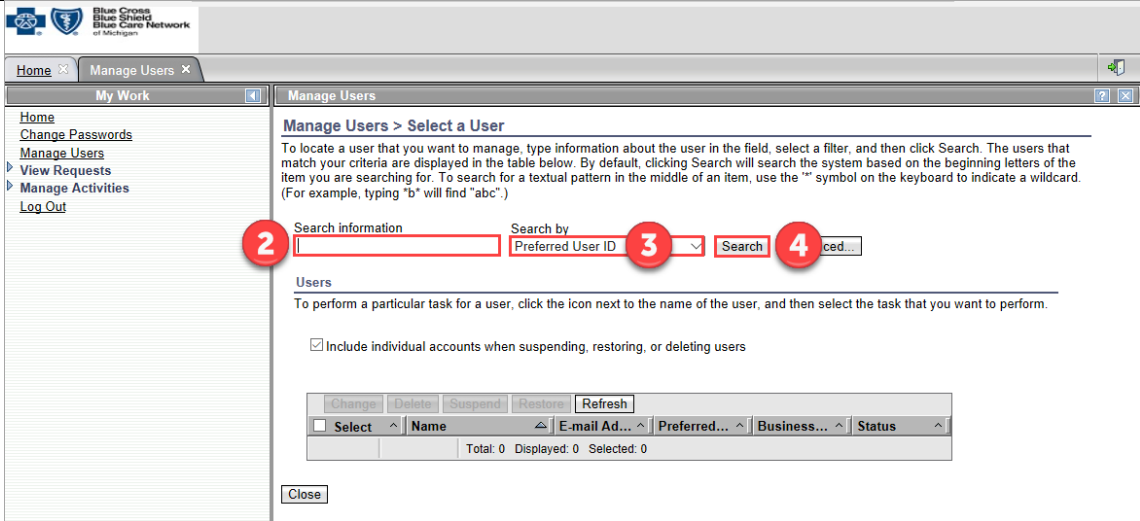
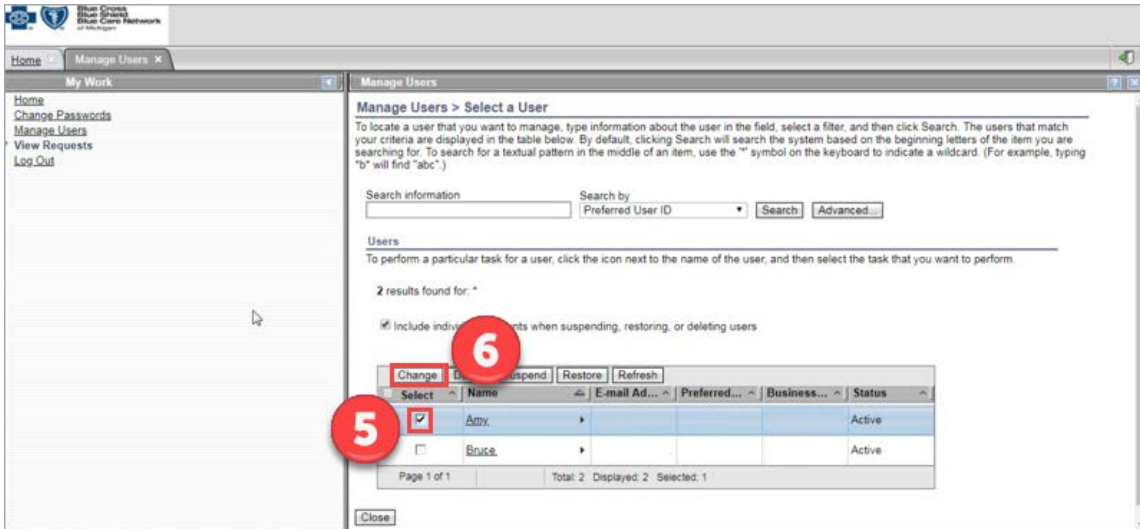
Task 16 Adding Services to a User

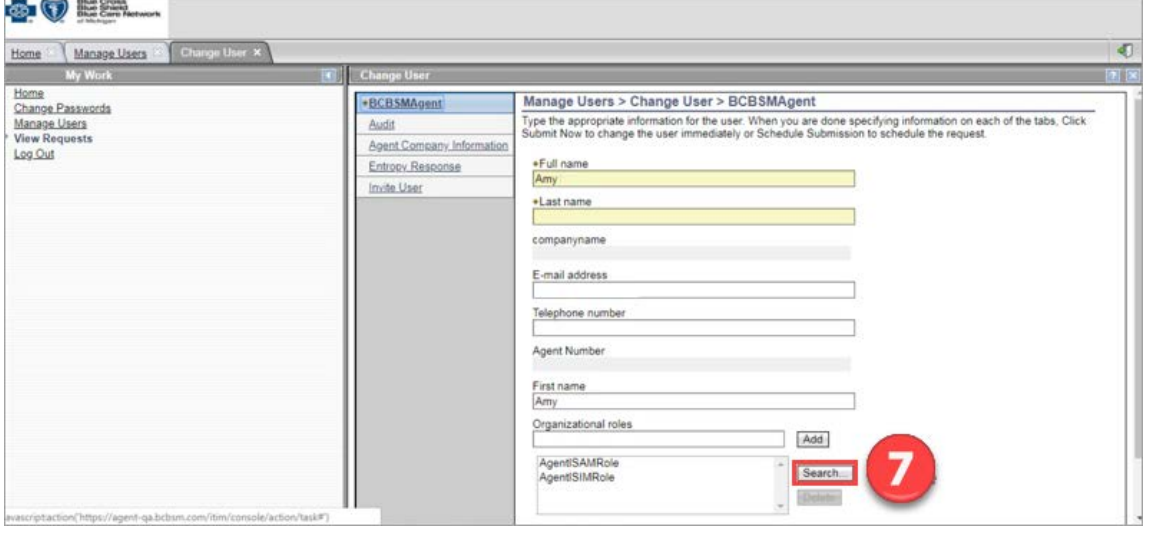
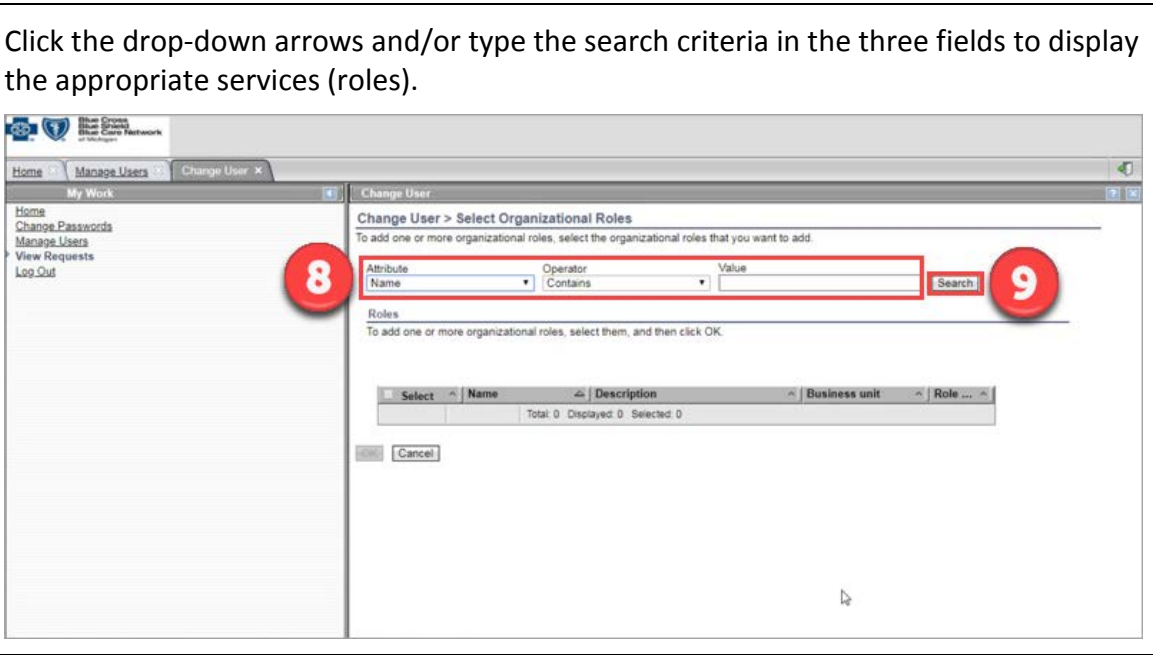
An administrator can grant the necessary services to a user's account. The administrator does not have to wait for a user to request access to services to grant access. Administrators are always limited to granting only those services to which their company has access.

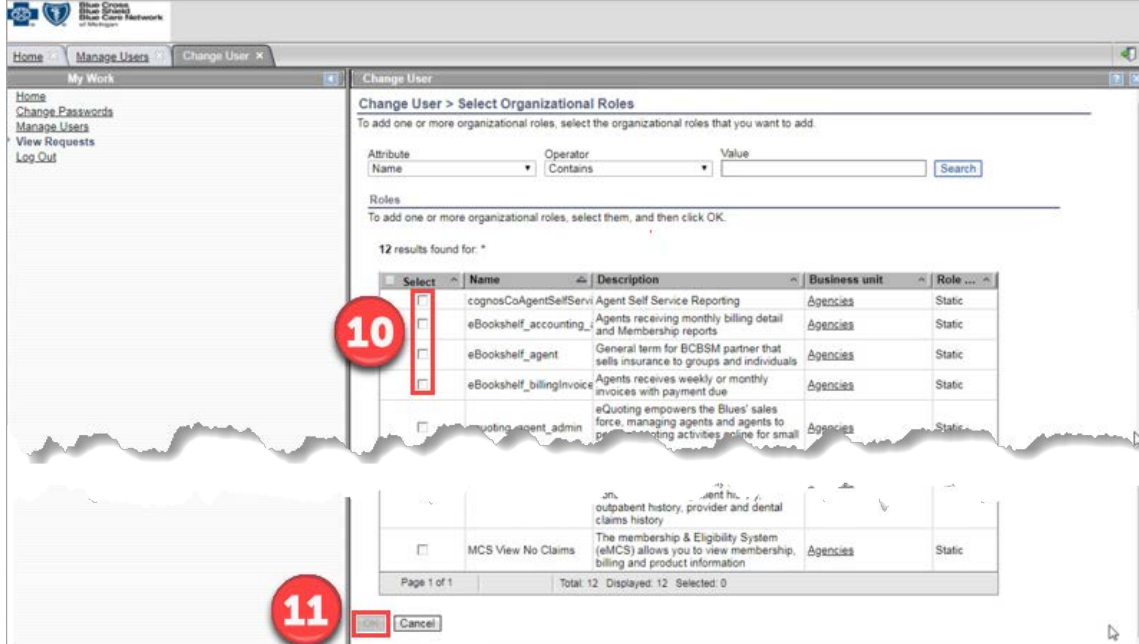
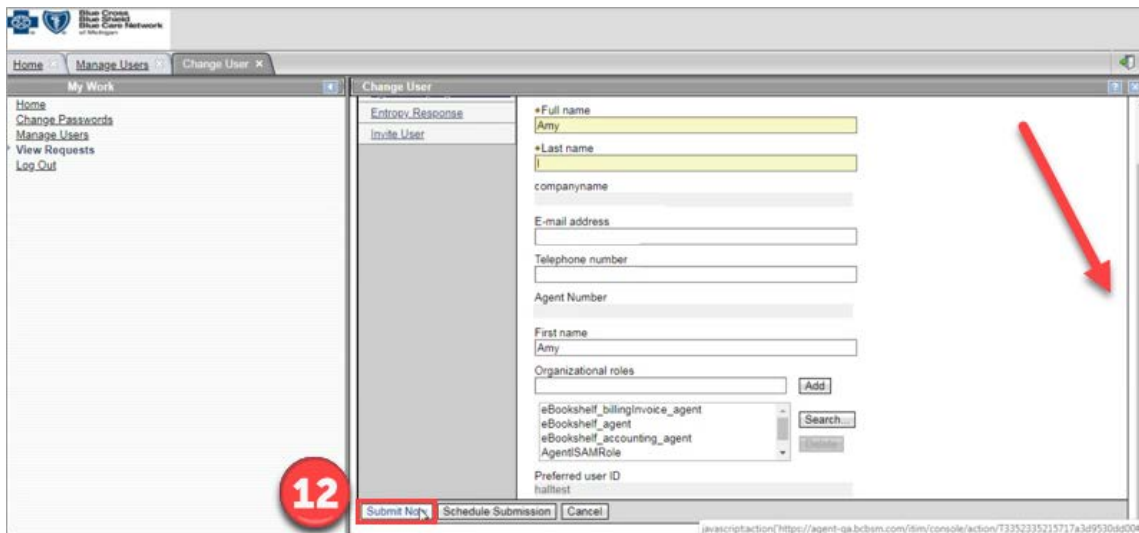
- **Note:** This task assumes you are successfully logged in and have selected **User Administration**. All fields marked with an asterisk (*) are required.

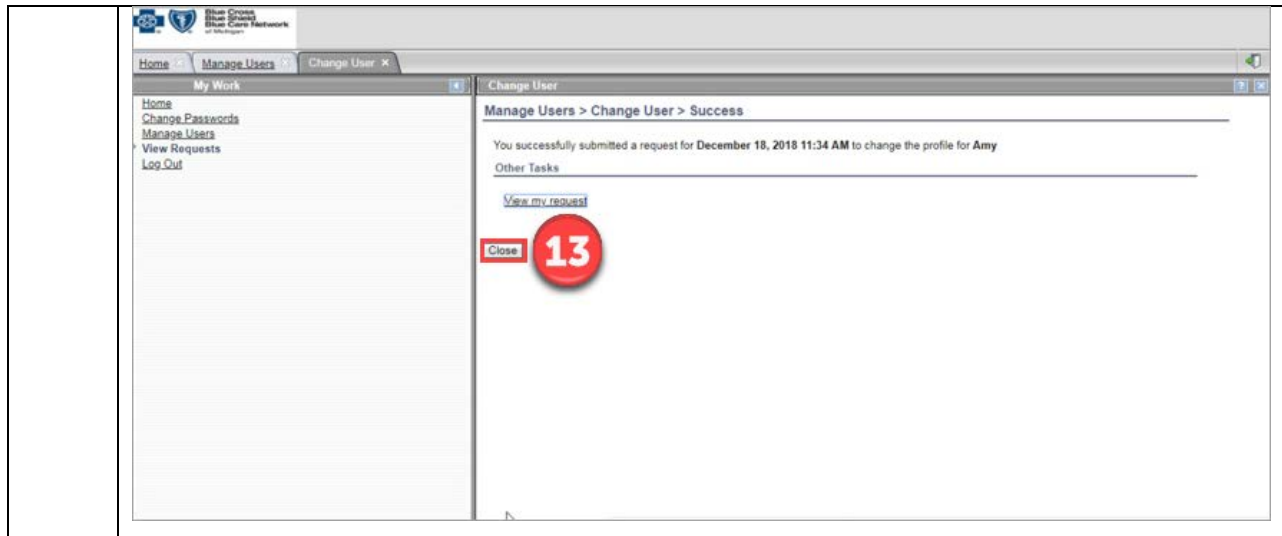
Complete the following steps to add services to a user.

Step	Action
1	<p>Click the Manage Users link.</p>  <p>The screenshot shows the Blue Cross Blue Shield Blue Care Network of Michigan user management interface. On the left is a navigation menu with links: Home, Change Passwords, Manage Users, View Requests, Manage Activities, and Log Out. The main content area has a header with a user profile icon and a 'Welcome' message. Below the header, there are 'Common Tasks' listed: 'Manage Users' (highlighted with a red box and a large red circle with the number 1) and 'Change Passwords'. To the right of these tasks are brief descriptions: 'Create, delete and manage users in the system.' and 'Change passwords for a selected user.' respectively.</p>
2	<p>Type the user's information in the Search field.</p> <p>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.</p>

	
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 add services (roles) to.
	
6	Click Change .
7	Click Search .

	
8	<p>Click the drop-down arrows and/or type the search criteria in the three fields to display the appropriate services (roles).</p> 
9	<p>Click Search.</p>
10	<p>Click the checkbox(es) next to the service(s) you want to add.</p> <p>Note: The services displayed depend on the type of user (i.e. Agent, Group, Association/Chamber) viewing them.</p>

	 <p>Change User > Select Organizational Roles</p> <p>To add one or more organizational roles, select the organizational roles that you want to add.</p> <p>Attribute: Name Operator: Contains Value: Search</p> <p>Roles</p> <p>To add one or more organizational roles, select them, and then click OK.</p> <p>12 results found for: *</p> <table><thead><tr><th>Select</th><th>Name</th><th>Description</th><th>Business unit</th><th>Role ...</th></tr></thead><tbody><tr><td><input type="checkbox"/></td><td>cognosCoAgentSelfServi</td><td>Agent Self Service Reporting</td><td>Agencies</td><td>Static</td></tr><tr><td><input type="checkbox"/></td><td>eBookshelf_accounting_</td><td>Agents receiving monthly billing detail and Membership reports</td><td>Agencies</td><td>Static</td></tr><tr><td><input type="checkbox"/></td><td>eBookshelf_agent</td><td>General term for BCBSM partner that sells insurance to groups and individuals</td><td>Agencies</td><td>Static</td></tr><tr><td><input type="checkbox"/></td><td>eBookshelf_billingInvoice</td><td>Agents receives weekly or monthly invoices with payment due</td><td>Agencies</td><td>Static</td></tr><tr><td><input type="checkbox"/></td><td>eQuoting empowers the Blues' sales force, managing agents and agents to promoting activities online for small</td><td></td><td>Agencies</td><td>Static</td></tr><tr><td><input type="checkbox"/></td><td>MCS View No Claims</td><td>The membership & Eligibility System (eMCS) allows you to view membership, billing and product information</td><td>Agencies</td><td>Static</td></tr></tbody></table> <p>Page 1 of 1 Total: 12 Displayed: 12 Selected: 0</p> <p>OK Cancel</p>	Select	Name	Description	Business unit	Role ...	<input type="checkbox"/>	cognosCoAgentSelfServi	Agent Self Service Reporting	Agencies	Static	<input type="checkbox"/>	eBookshelf_accounting_	Agents receiving monthly billing detail and Membership reports	Agencies	Static	<input type="checkbox"/>	eBookshelf_agent	General term for BCBSM partner that sells insurance to groups and individuals	Agencies	Static	<input type="checkbox"/>	eBookshelf_billingInvoice	Agents receives weekly or monthly invoices with payment due	Agencies	Static	<input type="checkbox"/>	eQuoting empowers the Blues' sales force, managing agents and agents to promoting activities online for small		Agencies	Static	<input type="checkbox"/>	MCS View No Claims	The membership & Eligibility System (eMCS) allows you to view membership, billing and product information	Agencies	Static
Select	Name	Description	Business unit	Role ...																																
<input type="checkbox"/>	cognosCoAgentSelfServi	Agent Self Service Reporting	Agencies	Static																																
<input type="checkbox"/>	eBookshelf_accounting_	Agents receiving monthly billing detail and Membership reports	Agencies	Static																																
<input type="checkbox"/>	eBookshelf_agent	General term for BCBSM partner that sells insurance to groups and individuals	Agencies	Static																																
<input type="checkbox"/>	eBookshelf_billingInvoice	Agents receives weekly or monthly invoices with payment due	Agencies	Static																																
<input type="checkbox"/>	eQuoting empowers the Blues' sales force, managing agents and agents to promoting activities online for small		Agencies	Static																																
<input type="checkbox"/>	MCS View No Claims	The membership & Eligibility System (eMCS) allows you to view membership, billing and product information	Agencies	Static																																
11	Click OK .																																			
12	Scroll to the bottom of the screen and click Submit Now .																																			
	 <p>Change User</p> <p>Enter User</p> <p>Full name: Amy</p> <p>Last name: I</p> <p>Company name:</p> <p>E-mail address:</p> <p>Telephone number:</p> <p>Agent Number:</p> <p>First name: Amy</p> <p>Organizational roles:</p> <p>Search: eBookshelf_billingInvoice_agent, eBookshelf_agent, eBookshelf_accounting_agent, AgentSAMRole</p> <p>Preferred user ID: huffest</p> <p>Submit Now Schedule Submission Cancel</p>																																			
13	Click Close .																																			
	Note: The request has been submitted successfully.																																			

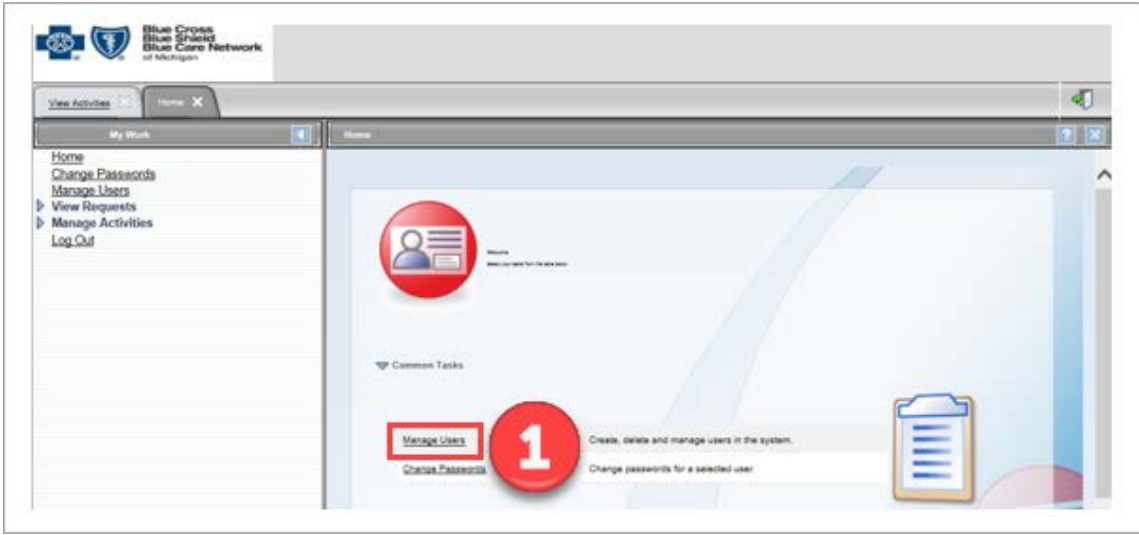
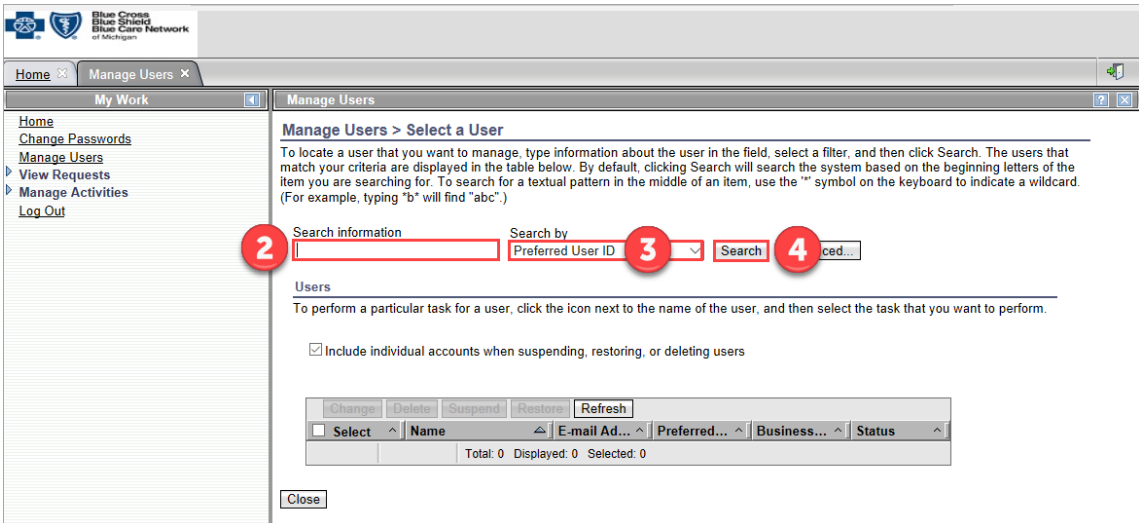


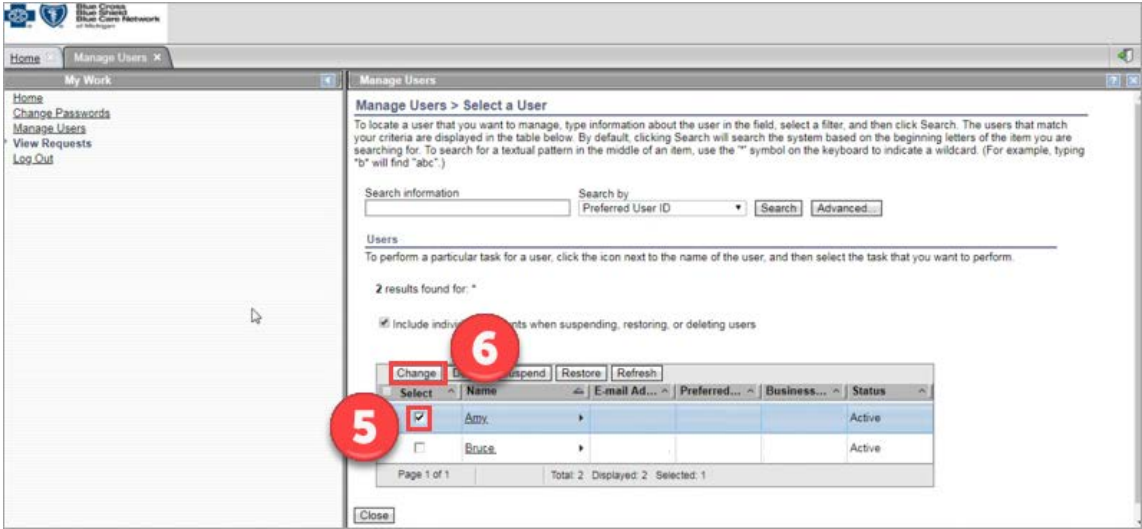
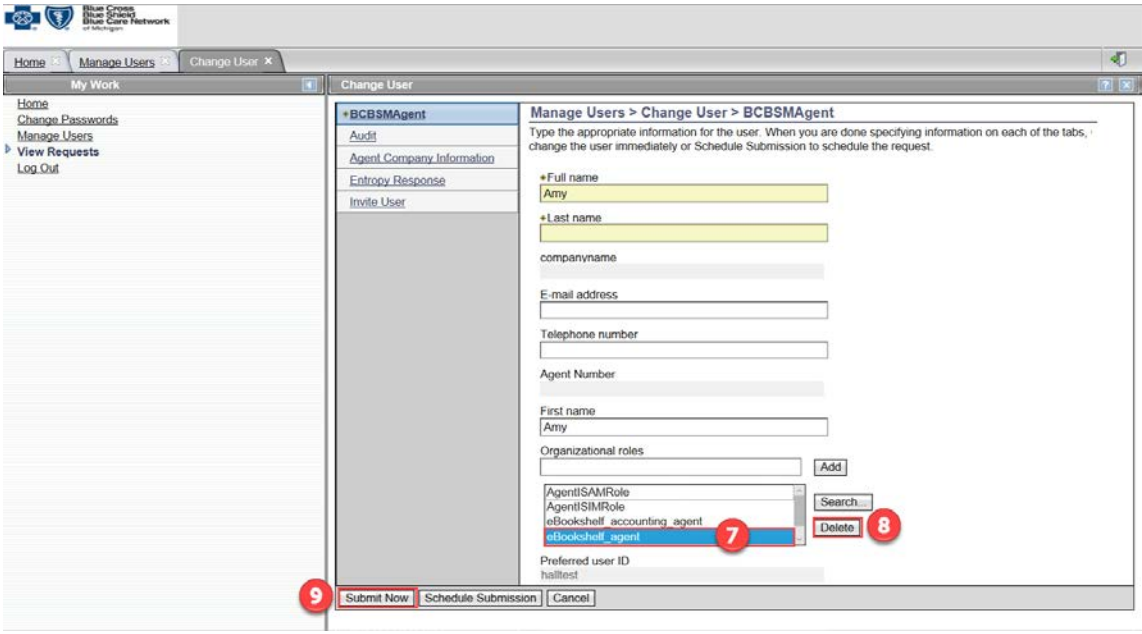
Task 17 Removing Access (Service) from a User

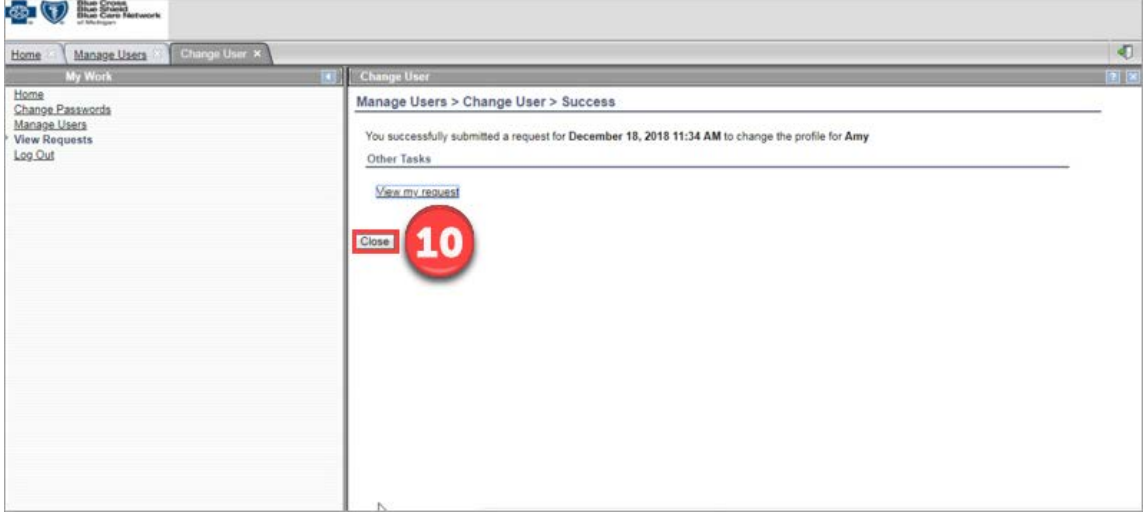
If a user no longer needs to have certain access (services), the administrator can revoke the unnecessary access from the user.

- **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.

Step	Action
1	<p>Click the Manage Users link.</p> 
2	<p>Type the user's information in the Search field.</p> <p>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.</p> 

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 .
7	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. 

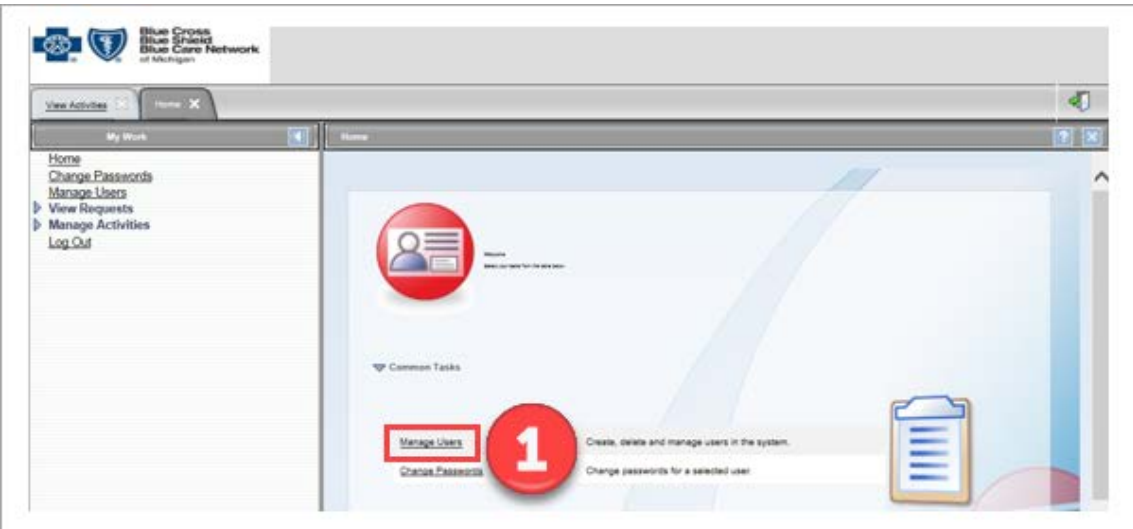
8	Click Delete .
9	Click Submit Now .
10	<p>Click Close.</p> <p>Note: The request has been submitted successfully.</p> 

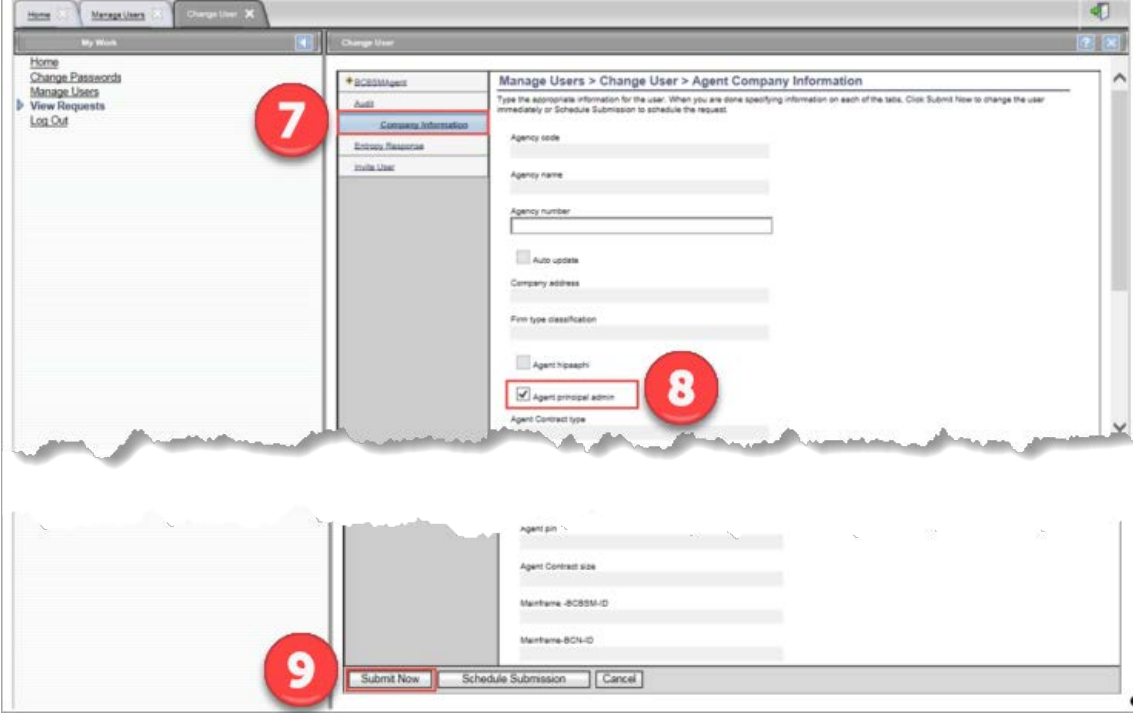

Task 18 Assigning Principal Administrator

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	<p>Click Manage Users.</p> 
2	<p>Type the user's information in the Search field.</p> <p>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.</p>

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

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.

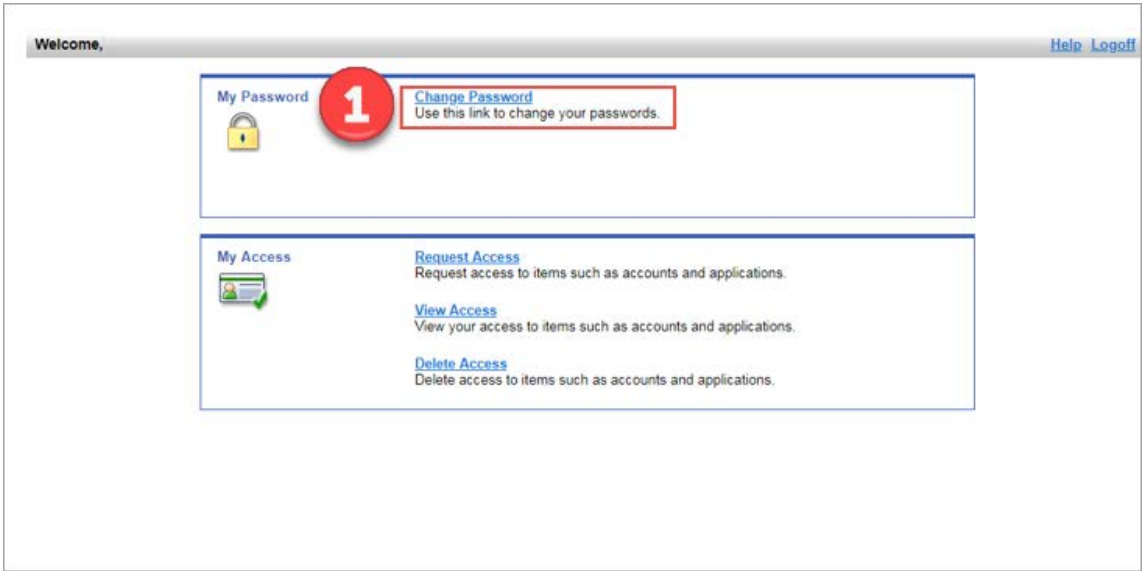
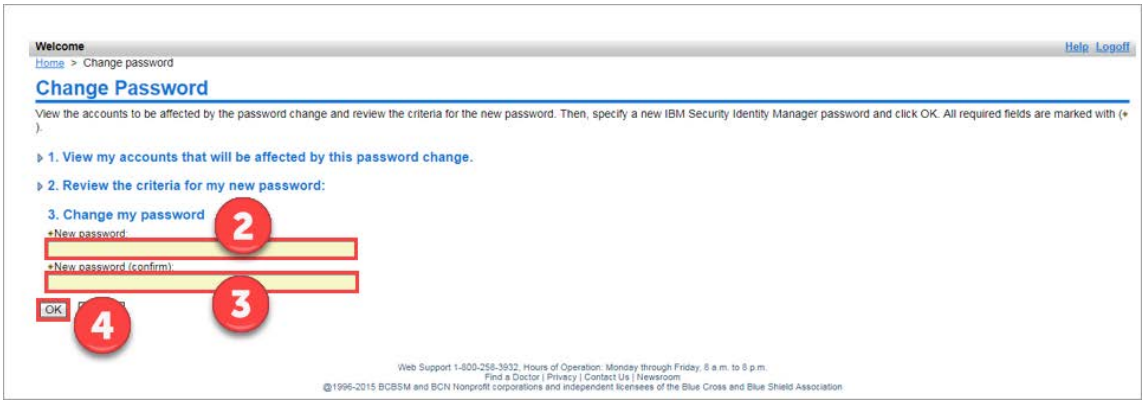


Task 19 Changing Password After Login

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
1	<p>Click Change Password.</p>  <p>The screenshot shows a user dashboard with a 'Welcome' header and 'Help Logoff' links. Under 'My Password', there is a 'Change Password' link with a red box and a red circle with the number 1. Below this, under 'My Access', there are links for 'Request Access', 'View Access', and 'Delete Access'.</p>
2	<p>Type the New password.</p>  <p>The screenshot shows the 'Change Password' form. It includes instructions and a list of steps. Step 3, 'Change my password', is highlighted with a red box and a red circle with the number 2. The 'New password' field is also highlighted with a red box and a red circle with the number 2. The 'New password (confirm)' field is highlighted with a red box and a red circle with the number 3. The 'OK' button is highlighted with a red box and a red circle with the number 4.</p>
3	<p>Re-type the New password to confirm.</p>
4	<p>Click OK.</p>

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.

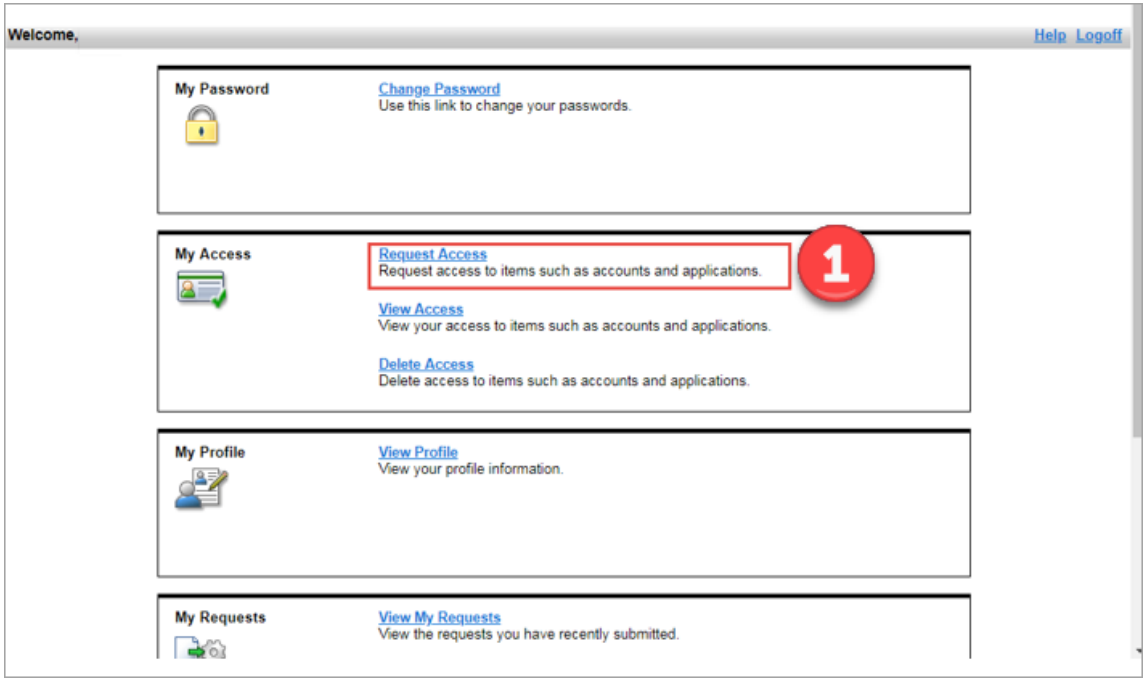
Web Support 1-800-258-3932, Hours of Operation: Monday through Friday, 8 a.m. to 6 p.m.
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Task 20 Requesting Access (Services)

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	<p>Click Request Access.</p>  <p>The screenshot shows a user portal with a 'Welcome,' header and 'Help Logoff' links. Below are four main sections: 'My Password' with a 'Change Password' link; 'My Access' with 'Request Access', 'View Access', and 'Delete Access' links; 'My Profile' with a 'View Profile' link; and 'My Requests' with a 'View My Requests' link. A red box highlights the 'Request Access' link in the 'My Access' section, and a red circle with the number '1' is placed next to it.</p>
2	<p>Select desired Access Name from the list.</p> <p>Note: The access (services) displayed will vary based on the type of user (i.e. Agent, Group, Association/Chamber).</p>

Welcome,

[Home](#) > Request access

Request Access

Choose Access
Click the name of the access you would like to request.

Access Name	Access Type	Description
BCExplainer	Application	CCA-eGateway Service Package
eBilling_Pay_Invoice_Access	Application	eBilling gives you access to billing information for your...
eBilling_View_Invoice_Access	Application	eBilling gives you access to billing information for your...
eBookshelf_accounting_group_user	Application	Groups receiving monthly billing details and members...
eBookshelf_billingInvoice_group_user	Application	Groups receiving weekly or monthly invoices with pay...
eBookshelf_financial_group_user	Application	For specific groups only. Use instead of location speci...
eBookshelfLocationSpecificAdmin	Application	This is normally used by Principal Administrators or B...
HCBO	Application	Manage your account with health care benefits online
MCS Update + Claims	Application	The membership & Eligibility systems allows you to vi...
MCS Update No Claims	Application	The membership & Eligibility System (eMCS) allows y...

Page 1 of 2 Page Number: 1 Go Total: 13 Displayed: 10

3 Click the **Request Access** button.

Welcome,

[Home](#) > [Request access](#) > Request access confirmation [Help](#) [Logout](#)

Request Access: eBilling_Pay_Invoice_Access

You have chosen to request access for the following information.

Access name: eBilling_Pay_Invoice_Access

Access type: Application

Description: eBilling gives you access to billing information for your group account or BCBSM book of business. Search by customer name or invoice to view current and past bills, and print transaction and payment reports

[Back](#) [Request Access](#)

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).

Welcome,

[Home](#) > Request access > Request submitted [Help](#) [Logout](#)

Request Submitted: New Access

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

Request Detail

Request ID: 2149315134849956726

Date submitted: December 11, 2018 10:12:49 AM

Request type: User Data Change

Account/Access: eBilling_Pay_Invoice_Access

Access type: Application

Description: eBilling gives you access to billing information for your group account or BCBSM book of business. Search by customer name or invoice to view current and past bills, and print transaction and payment reports

Related Tasks

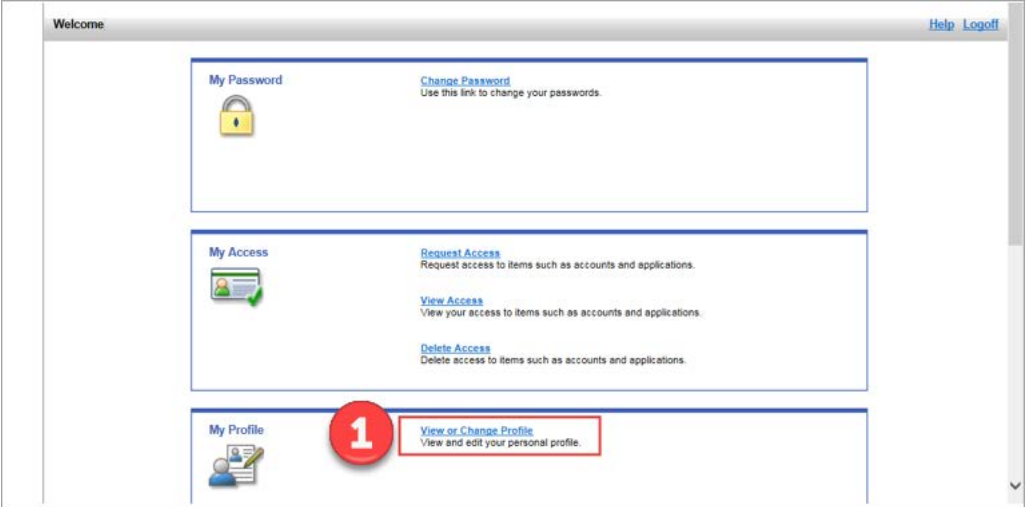
- To check on the status of your request, refer to the [View Requests](#) page.
- To request another access, click on [Request Access](#) to search for another access.
- To perform other tasks go to the [IBM Security Identity Manager Home](#) page.

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.

Step	Action
1	<p>Click View or Change Profile.</p> 
2	<p>Key the updated information in the correct fields.</p> <p>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.</p>

	<p>Home > View or change profile</p> <h2>View or Change Profile</h2> <p>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 (*).</p> <div> <div> * BCBSMAgent Audit Agent Company Information Entropy Response Invite User </div> <div> <div> <div>* Full name</div> <div></div> </div> <div> <div>* Last name</div> <div></div> </div> <div> <div>* companyname</div> <div></div> </div> <div> <div>E-mail address</div> <div></div> </div> <div> <div>Telephone number</div> <div></div> </div> <div> <div>pin</div> <div></div> </div> <div> <div>Agent Number</div> <div></div> </div> <div> <div>First name</div> <div></div> </div> <div> <div>Organizational roles</div> <div> <div>AgentISAMRole</div> <div>AgentISIMRole</div> <div>MCS View No Claims</div> </div> <div> <div>Search</div> <div>Delete</div> </div> </div> <div> <div>* Preferred user ID</div> <div></div> </div> </div> </div> <div> <div>OK</div> <div>3</div> </div>
3	Click OK.

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

<p>Home > View or change profile > Request submitted</p> <h2>Request Submitted: View or Change Profile</h2> <p>You have submitted a request. Below is the information available to you at this time.</p> <div> <h3>Request Detail</h3> <p>Request ID: 8756640398130397198</p> <p>Date submitted: December 4, 2018 9:01:13 AM</p> <p>Request type: View or Change Profile</p> <p>Account/Access:</p> </div> <div> <h3>Related Tasks</h3> <table border="1"> <tr> <td>To check on the status of your request, refer to the View My Requests page.</td> </tr> <tr> <td>Go to View or Change Profile page.</td> </tr> <tr> <td>To perform other tasks go to the IBM Security Identity Manager Home page.</td> </tr> </table> </div> <div> <p>Web Support 1-800-256-3932, Hours of Operation: Monday through Friday, 8 a.m. to 8 p.m. Find a Doctor Privacy Contact Us Newsroom © 1996-2015 BCBSM and BCN Nonprofit corporations and independent licensees of the Blue Cross and Blue Shield Association</p> </div>		To check on the status of your request, refer to the View My Requests page.	Go to View or Change Profile page.	To perform other tasks go to the IBM Security Identity Manager Home page.
To check on the status of your request, refer to the View My Requests page.				
Go to View or Change Profile page.				
To perform other tasks go to the IBM Security Identity Manager Home page.				

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.

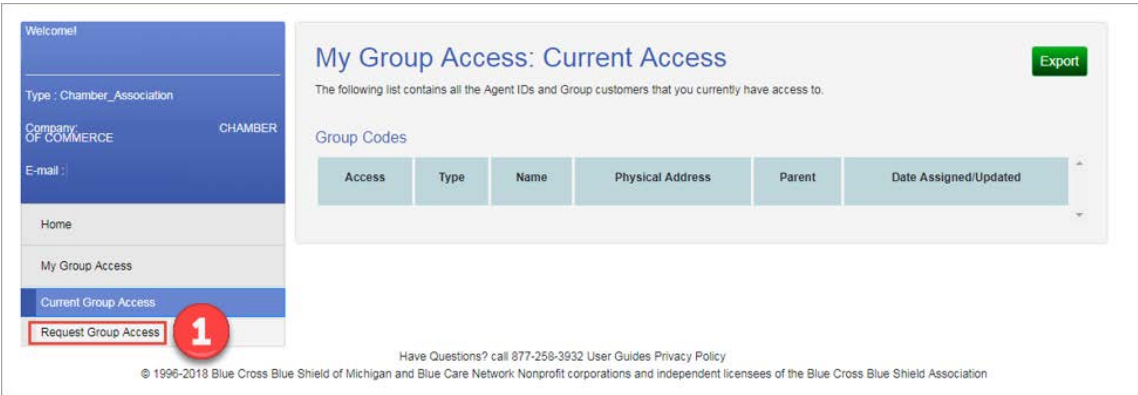
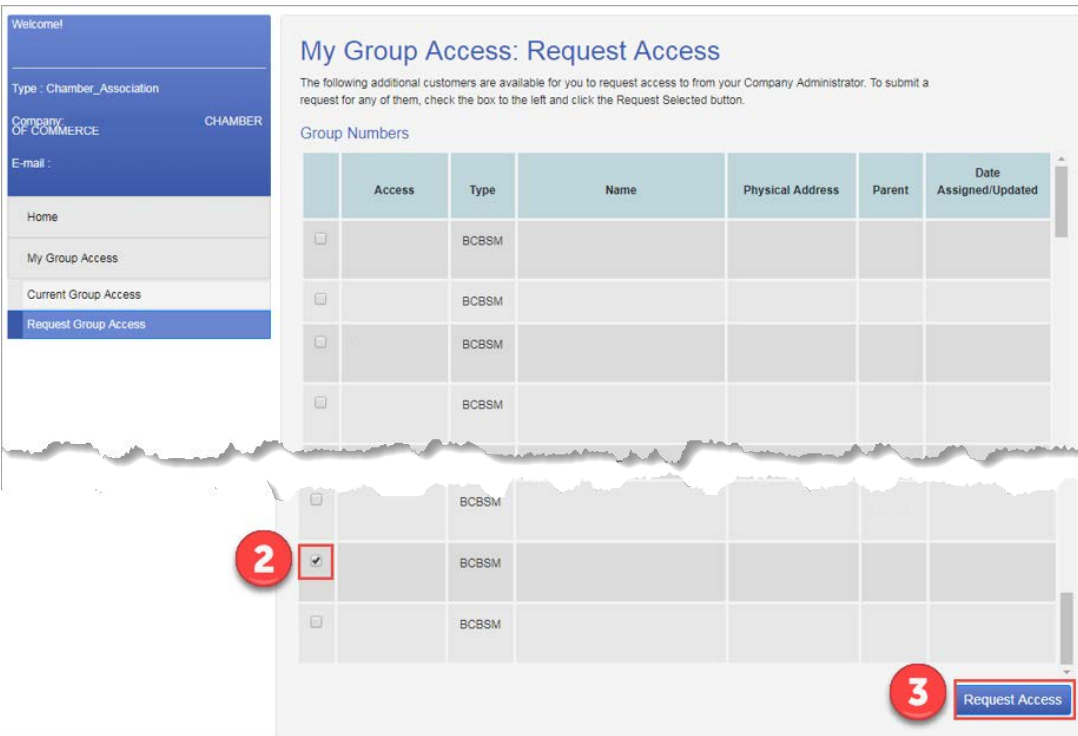


Task 22 Requesting Group Codes

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.

Step	Action
1	<p>Click Request Group Access.</p> 
2	<p>Select the checkbox(es) for the Group Code(s) you want to request.</p> 
3	<p>Click Request Access.</p>