

## Agent/Group Identity Manager - Desk Level Procedures

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

Task Number	Task Name
<b>1</b>	<b>Non-Administrator Procedures .....2</b>
1.1	Portal Access – Non-Administrator .....2
Task 1	Changing Password After Login ..... 3
Task 2	Requesting Access (Services)..... 5
Task 3	Updating User Profile ..... 7
1.2	Group Code Access - Non-Administrator .....9
Task 4	Requesting Group Codes ..... 10

# 1 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



## 1.1 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.

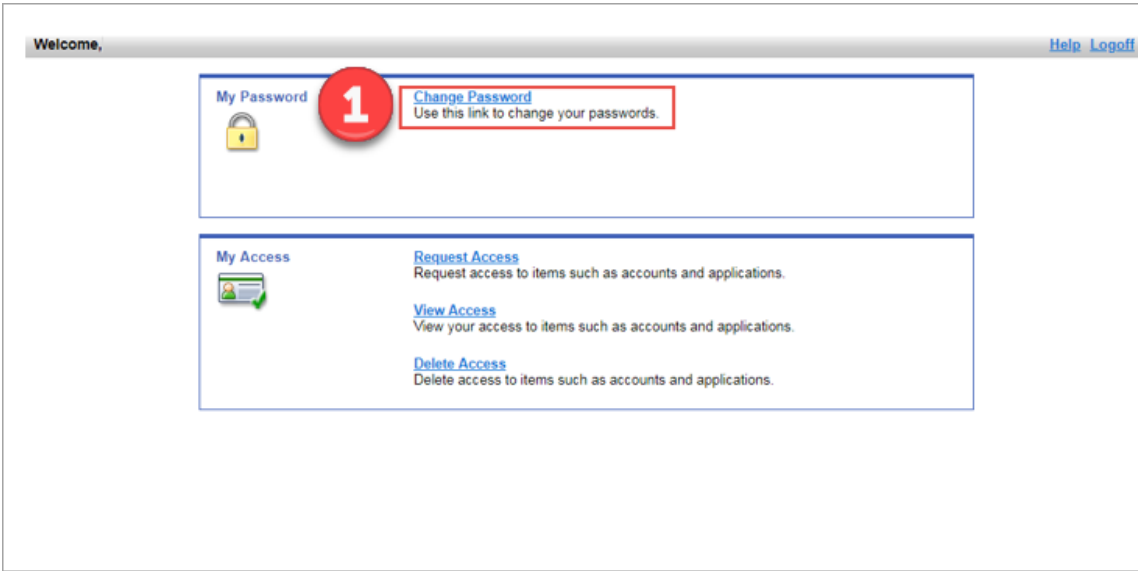



## Task 1 Changing Password After Login

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 <b>Change Password</b>.</p>  <p>The screenshot shows a user interface 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 containing the number 1. Below this, there is a 'My Access' section with links for 'Request Access', 'View Access', and 'Delete Access'.</p>
2	<p>Type the <b>New password</b>.</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 containing the number 2. The 'New password' field is also highlighted with a red box and a red circle containing the number 2. Other fields include 'New password (confirm)' and an 'OK' button, both highlighted with red boxes and red circles containing the number 4.</p>
3	<p>Re-type the <b>New password</b> to confirm.</p>
4	<p>Click <b>OK</b>.</p>

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

## Request Submitted: Change Password

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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.

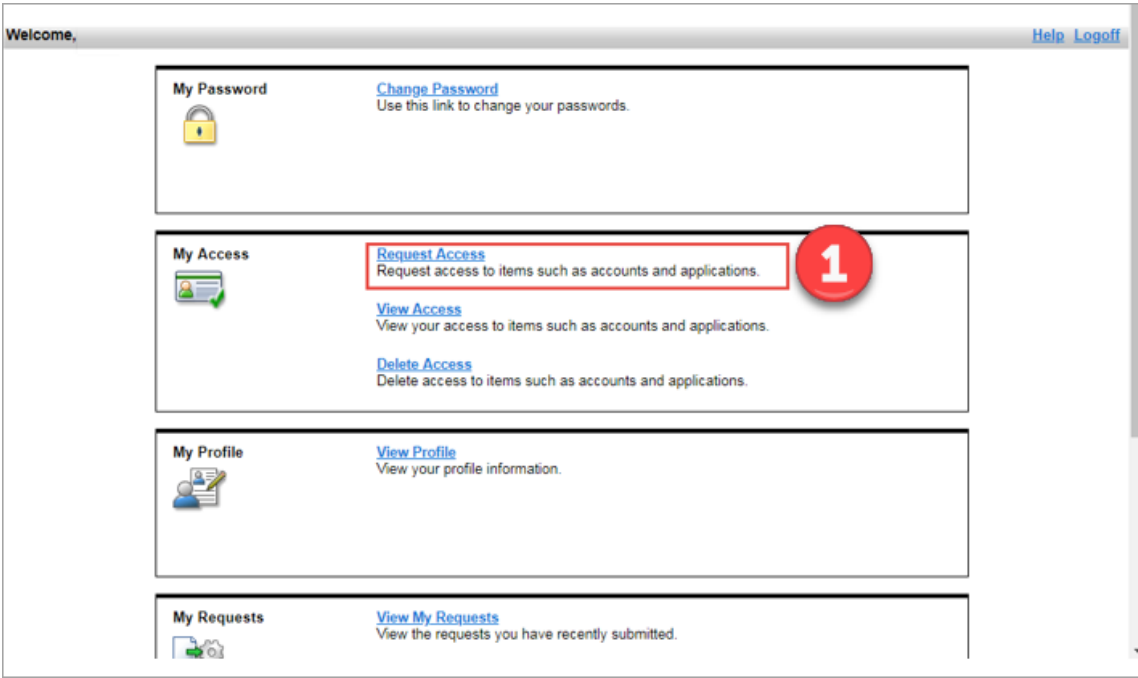
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## Task 2 Requesting Access (Services)

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 <b>Request Access</b>.</p>  <p>The screenshot shows a user portal with a 'Welcome,' header and 'Help Logoff' links. Below the header 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. The 'Request Access' link in the 'My Access' section is highlighted with a red box and a red circle with the number '1' next to it.</p>
2	<p>Select desired <b>Access Name</b> from the list.</p> <p><b>Note:</b> 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
<a href="#">BCExplainer</a>	Application	CCA-eGateway Service Package
<a href="#">eBilling_Pay_Invoice_Access</a> <b>2</b>	Application	eBilling gives you access to billing information for your...
<a href="#">eBilling_View_Invoice_Access</a>	Application	eBilling gives you access to billing information for your...
<a href="#">eBookshelf_accounting_group_user</a>	Application	Groups receiving monthly billing details and members...
<a href="#">eBookshelf_billingInvoice_group_user</a>	Application	Groups receiving weekly or monthly invoices with pay...
<a href="#">eBookshelf_financial_group_user</a>	Application	For specific groups only. Use instead of location speci...
<a href="#">eBookshelfLocationSpecificAdmin</a>	Application	This is normally used by Principal Administrators or B...
<a href="#">HCBO</a>	Application	Manage your account with health care benefits online
<a href="#">MCS Update + Claims</a>	Application	The membership & Eligibility systems allows you to vi...
<a href="#">MCS Update No Claims</a>	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, [Help](#) [Logout](#)  
[Home](#) > [Request access](#) > Request access confirmation

## 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](#) **3**

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

## 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**

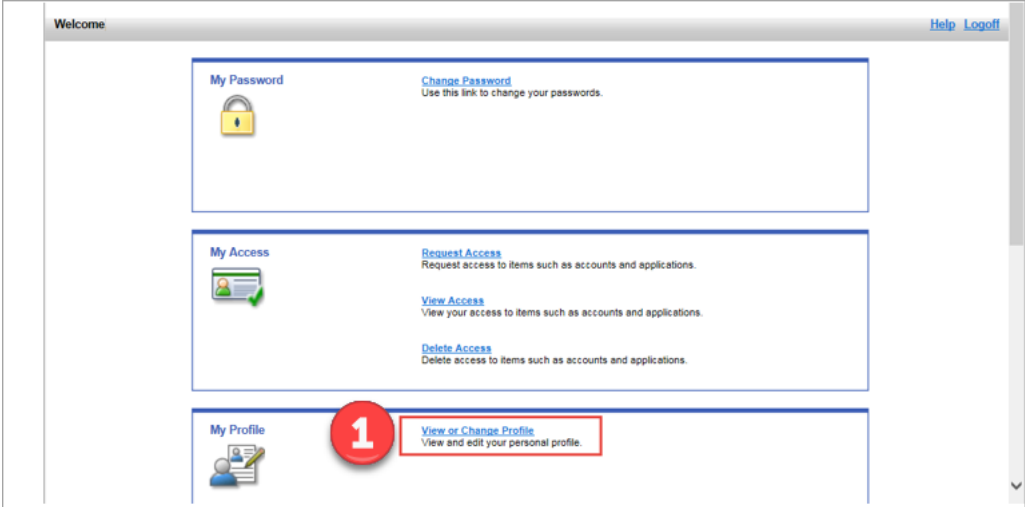
- To check on the status of your request, refer to the [View Requests](#) page.
- To request another access, click on [Request Access](#) to search for another access.
- To perform other tasks go to the [IBM Security Identity Manager Home](#) page.

### Task 3 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 <b>View or Change Profile</b>.</p>  <p>The screenshot shows a user interface with a 'Welcome' header and 'Help' and 'Logout' links. Below the header are three main sections: 'My Password' with a 'Change Password' link, 'My Access' with 'Request Access', 'View Access', and 'Delete Access' links, and 'My Profile' with a 'View or Change Profile' link. A red circle with the number '1' is overlaid on the 'View or Change Profile' link, which is also enclosed in a red rectangular box.</p>
2	<p>Key the updated information in the correct fields.</p> <p><b>Note:</b> 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>

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**
  - \* Full name
  - \* Last name
  - \* companyname
  - E-mail address
  - Telephone number
  - pin
  - Agent Number
  - First name
  - Organizational roles
    - AgentISAMRole
    - AgentISIMRole
    - MCS View No Claims
    - \* Preferred user ID
- Audit
- Agent Company Information
- Entropy Response
- Invite User

OK

3 Click OK.

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: 8756640398130397198  
Date submitted: December 4, 2018 9:01:13 AM  
Request type: View or Change Profile  
Account/Access:

**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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## 1.2 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.

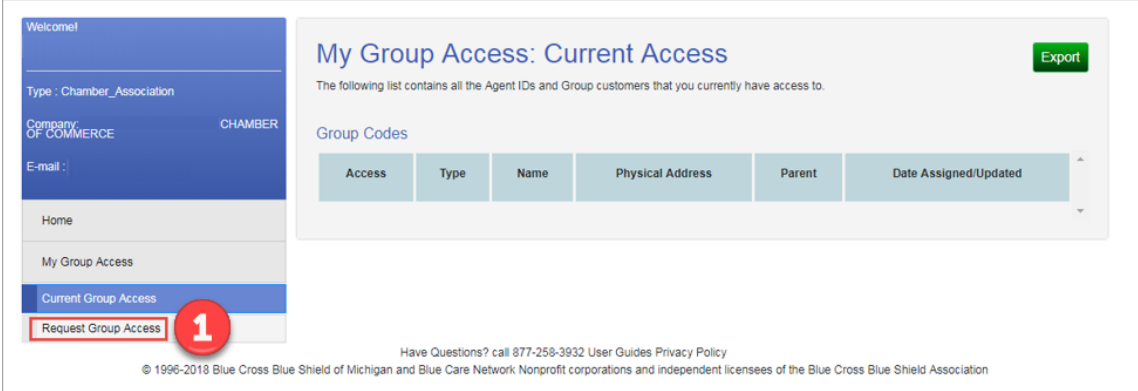
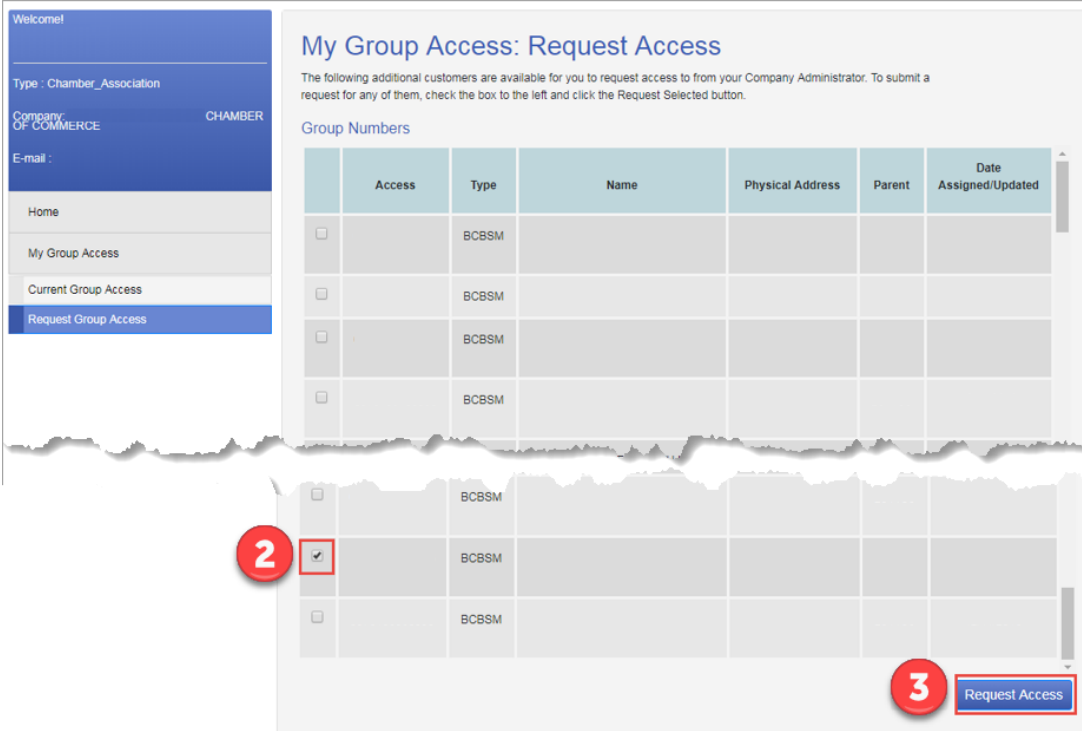


## Task 4 Requesting Group Codes

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 <b>Request Group Access</b>.</p>  <p>The screenshot shows a user interface with a left sidebar containing navigation links: Home, My Group Access, Current Group Access, and Request Group Access. The main content area is titled 'My Group Access: Current Access' and includes an 'Export' button. Below the title is a table with columns: Access, Type, Name, Physical Address, Parent, and Date Assigned/Updated. The 'Request Group Access' button in the sidebar is highlighted with a red box and a red circle containing the number 1.</p>
2	<p>Select the checkbox(es) for the Group Code(s) you want to request.</p>  <p>The screenshot shows the 'My Group Access: Request Access' page. The sidebar navigation is the same as in the previous step, but 'Request Group Access' is now selected. The main content area is titled 'My Group Access: Request Access' and includes a table with columns: Access, Type, Name, Physical Address, Parent, and Date Assigned/Updated. The table contains several rows, each with a checkbox in the 'Access' column. One checkbox is checked and highlighted with a red box and a red circle containing the number 2. The 'Request Access' button in the bottom right corner is highlighted with a red box and a red circle containing the number 3.</p>
3	<p>Click <b>Request Access</b>.</p>