Employer Access Add Team Member Procedure

Summary

The *Add Team Member* procedure describes how to add a Team Member's access to Employer Access. To add access, only the Authorized Agent as Employer Admin may add a Team Member and assign a User Role. There is no limit on the creation of Team Members.

Procedure

Perform one of the following actions to enter the **Access Management** screens:

- In the **My Team** widget, click **View All** in the lower-right corner and then click **Add Team Member**.

OR

- From the Tool Bar, click the **Administration** (last) icon, and select **Access Management** and then click **Add Team Member.**

1. Enter the last name of the person you wish to make a new Team Member and click **Search**.
2. Click the **Create Team Member** if the individual you searched for is not listed or highlight the member and click **Add Selected.**
3. Complete the **Basic Information** section if not complete.
4. Click **Add Partner** (in the middle section); enter your **Employer Number**, preceded by a zero and click **Search**.
5. Click **Add Selected** in the lower right corner.
6. Click on the down caret to select the User Access Role you wish to assign (see Roles below), then click **Save.**
7. A pop up window will appear that you are about to grant access to the Portal, select **'Yes'.**
8. A message will appear at the top, stating an email has been sent to the new User to complete their registration process.

IMRF Employer Roles

<u>Employer Admin</u> – Previously known as the Authorized Agent, will have access to all portal functions, be the primary contact for all information from IMRF and may create new users.

Employer All Access - Previously known as the Security Administrator, will have access to all portal functions, however they *cannot* create new users.

Employer Financial - previously referred to as a Web Assistant, has access to all financial functions, i.e. monthly Wage Report, Wage Adjustments, Pensioner RTW, Insurance & Union Deductions, Accounts Payables and Receivables, all payment functions and history.

Employer HR - previously referred to as a Web Assistant, has access to all member processes: Enrollments, terminations, change member information, death and disability, and Pensioner RTW.

Employer View Only - user is able to view and read basic information only.

This Procedure is complete.