Add Team Member Procedure

Summary

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

Procedure

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

IMRF Partner Roles

<u>**Deduction Org Admin**</u> – Will have access to all Partner Portal functions, be the primary contact for all information from IMRF and may create new users.

> **Deduction Org All Access** - Will have access to all Partner Portal functions, however they *cannot* create new users.
>
> **Deduction Org View Only** - user is able to view and read basic information only.

This Procedure is complete.