![Delta Dental logo]

Employer Services Portal Quick Guide

How to update a portal user

As the Super User or Client Delegate, you have the ability to update a user's personal information or change their portal access.

NOTE: Client Delegates mirror the permissions of the Super User.

To change a delegate's access, you must first change their role to Client User. The permissions and access of Super Users and Delegates can only be completed by your Delta Dental of Minnesota account representative. To designate someone new as the Super User for your group, please contact your Delta Dental of Minnesota account representative.

Client Users have access only as it is assigned to them when they are set up. A Client User may be granted access to all or some of the portal functions and to all or some of the client/sub-clients available to the Super User.

To Update a User's Information:

1. Select users on the left navigation bar.

2. Search for and/or select the user by clicking on the user's last name on the manage client users tab.

3. The user details page opens. *(Image 1)*

4. Selecting actions in the user Information area will allow you to:
    a. Edit user info – change the user's personal information or change their user role.
    b. Remove access – will set the users status to Inactive and will disable their account.
    c. Resend invite link – If the user needs to claim their account, you can send an updated invitation

5. Selecting edit access will enable you to change the user's permissions or allow more of less portal functionality and/or add or remove access to specific sub-clients.
    a. The view is collapsed to the Client level by default.
    b. Users that have a check mark at the client level have access to all sub-clients associated with the client.
    c. For users that have dashes at the client level, their access varies by sub-client.
    d. Select the show sub-clients check box to see associate sub-clients by client.
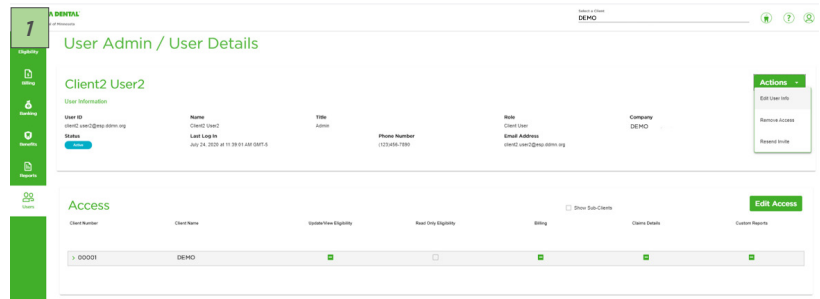
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To change a user's permission:

1. To change a user's permission, select edit access.

2. The change access screen appears. *(Image 2)*

3. Select the expand arrow near the client ID to expand the permissions grid to show all sub-clients.

4. In the permissions grid, select or deselect the functions you wish to change for the user.

5. Click save once complete.

6. Select cancel to return to the user details page without updates.