

Benefit Manager Toolkit® Quick Guide

How to create a user

1. Click on **User Admin**.
2. Click **Create User** once all required fields have been completed.
3. Click **Manage Authorizations** to finish the set up process for this new user.
4. Click **Edit** to set permissions.
5. Assign authorizations for:
 - All Subgroups
 - Customize Subgroups
 - or
 - Assign them as a delegate which includes all subgroups and provides the same access and permissions as the BMT Administrator.
6. After selecting the radio button for **Select to Customize Subgroups** the BMT Administrator or their delegate can then specify what authorizations to give the user. These options will display based on the BMT Administrator’s own access – a user will never have the ability to have more authorizations than the BMT Administrator.
 - The BMT Administrator or their delegate is responsible for informing the new user of their username.
 - A welcome email is generated for the new user letting them know that an account has been created for them. The BMT Administrator or their delegate is responsible for informing the new user of this email.

