

INSTRUCTIONS: Email the completed form to your Benefits Services Consultant or benefits@abmunis.ca

1. User Information

Full name of organization		Division #	
A Contact Information - mandatory fields marked with an (*)			
First name *	Last name *	Date of birth *	Preferred name
Title		Business email address *	Direct phone number and ext
Job Roles (Check all that apply) Please see descriptions on next page.			
☐ Plan administrator	☐ Billing contact	☐ Decision maker	☐ Disability contact
		☐ e2r contact	☐ Communications contact

2. Online Access Addition/Change

This section defines the type of access the user will have to the benefits online platform		
Online access effective date		(mm-dd-yyyy)
☐ Grant plan admin access (includes billing access)	☐ Grant billing access Only	Sign in email address (if different from the email listed in section 1)

3. Plan Admin Access

Complete this section only if you have granted Plan Admin Access in Section 2 above. This section defines the degree of Systems access the user will have. Note that limiting class access or restricting salary access in section 3A or 3C below will disable billing access.

A Classes
Grant access to
☐ All classes ☐ All classes, except those listed below ☐ Only those classes listed below
List classes (if access is not being granted to all classes)
B Notifications
Please indicate the types of automatic email notifications this user should receive. It is recommended that at least one user receive all notification types.
Email Notifications (check all that apply)
☐ Benefit conversions ☐ Billings ☐ Excess coverage ☐ Overage dependents
☐ Benefit packages ☐ Enrollments ☐ Member updates
Additional information
C Optional Restrictions
Account access restrictions (check all that apply)
☐ No salary access ☐ Read only access

4. Termination of Online Access

This section terminates a previous user's access to the benefits online platform, if applicable

Online Access Termination Date		(mm-dd-yyyy)
First Name	Last Name	Email Address

5. Authorization

Benefits online platform access must be authorized by a signing authority

Platform access authorized by	Date signed (mm-dd-yyyy)	Authorized Signature
		X

Job Role Descriptions

Plan Administrator roles allows a contact from the group to perform the following in the BOP system:

- View, enrol and update employee information
- View invoicing information
- Normally this role is set up so that this person can receive notifications for when invoices are ready, for excess approval and for overage dependents.

Add Read-Only Plan Administrator Role

There may be a need to provide employee information access to someone, but not allow them to make updates or enrollments. People set up with Read Only access will be able to:

- View employee information
- View/download employee reports such as benefit statements, interim statements, ID cards, etc.
- View invoicing information (if specified to have access)

Billing Contact roles allows a contact from the group to view invoicing information only for the accounts they have been set up with.

Decision Maker roles identifies the contact from a group who makes decisions for the company.

For example, they could be the renewal contact or signing authority.

****This role does not provide any access to the BOP system – it merely captures who to contact when decisions are to be made.**

Disability Contact roles identifies the contact from a group who is to be the contact regarding any disability claims.

****This role does not provide any access to the BOP system – it merely captures who to contact regarding disability claims/issues.**

e2r Contact roles allows a contact from the group to access to e2r resources.

****This role does not provide any access to the BOP system – it merely captures who is able to have access to e2r.**

Communications Contact roles will receive all the communications from the benefits team.

****This role does not provide any access to the BOP system – it merely captures who to send communications to.**