



MAIN OFFICE
 201 Merchant St, Suite 1100
 Honolulu, HI 96813
 Phone (808) 533-3222
 Fax (808) 533-8777

BenefitPoint Access Request Form

Important Procedural Instructions (please read): *All fields must be completed.*
New & Change Employee request – Unit Manager to Complete, Sign

Today's Date: New Employee Change Employee Employee Start Date:

Name & Phone

First Name: Last Name:
 Email Address: Business Phone #: Fax #:

Region: Corporate Office: Honolulu Department: Employee Benefits

BROKER

Integration Code:	Title:	
Access Plan Updates		Enable Broker User Access to Posting Records
Account Service		Enable Riskmatch link "Benchmark This Plan"
BenefitPoint (BBI) Allow PHI Information on Reports		Mail Merge: Access Mail Merge Wizard
BenefitPoint (BBI) Benefits Benchmark		Mail Merge: Administrator
BenefitPoint (BBI) Contributions Benchmark		Mail Merge: Create Individual Mail Merge Letter
BenefitPoint (BBI) Executive		Mail Merge: Executive Administrator
BenefitPoint (BBI) Executive Financial Permission		Mail Merge: Modify Projects
BenefitPoint (BBI) Operational		Mail Merge: Modify Templates
BenefitPoint (BBI) Report Administrator		Mail Merge: Publish Templates
BenefitPoint (BBI) Save My Report Results		Maintain Office Contacts
Commission Rules: View Only		Product Service
Commission Rules: View/Edit		QuickSight: Broker
Delete Activity Log Records		QuickSight: Broker (Executive)
Delete Any Plan or Product w/ No Posting Record or Invoices		Rates: View Only
Delete Plan and Product Elements		Splits: Enable Assign Splits tool on accounts
Delete / Replace Attachments		Splits: View Only
Edit All Accounts (based on Access Area)		View Financial Info
Edit Cancellation and Reinstatement Info		View/Edit Investments
		Web Services Access Only

User will have edit access to accounts in his or her existing account team(s), and view access to the following regions and offices locations

No Regions & Office / Location(s)	Corporate (Entire Region)
All Regions & Office / Location(s)	Corporate Benefits_Secure1
Selected Regions & Office / Location(s)	Corporate Benefits_Secure2
	Corporate Honolulu

BROKER ADMIN

Add Administrators	Global Changes
Allow Custom Fields	Mail Merge: Administrator
BenefitPoint (BBI) Allow PHI Information on Reports	Mail Merge: Executive Administrator
BenefitPoint (BBI) Executive	Mail Merge: Modify Projects
BenefitPoint (BBI) Operational	Mail Merge: Modify Templates
BenefitPoint (BBI) Report Administrator	Mail Merge: Publish Templates
BenefitPoint (BBI) Save My Report Results	QuickSight: Broker Admin
Define Regions & Office / Locations	QuickSight: Broker Admin (Executive)
Edit Carrier List	QuickSight: Manage auto-emailed reports
Edit Custom Attribute View Level	Setup Service
Edit Firm Security	User Service



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Broker Admin continued

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All Regions & Office / Location(s)	Cortorate (Entire Region)
Selected Regions & Office / Location(s)	Corporate Benefits_Secure1
	Corporate Benefits_Secure2
	Corporate Honolulu

RTM Administrator

Allow User to Unpost Partially Posted Statements	QuickSight: RTM
BenefitPoint (BBI) Allow PHI Informantion on Reports	QuickSight: RTM (Executive)
BenefitPoint (BBI) Executive	Splits
BenefitPoint (BBI) Operational	Splits: Update Split process
BenefitPoint (BBI) Report Administrator	Statements: Unpost
BenefitPoint (BBI) Save My Report Results	View All/Edit Own Statements
Edit Firm Setting	View/Edit All Statements
Edit Over Payment Payee	View/Edit Own Statements
Enable Activity Log Access	Void and Revise Statements
Payees	

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All Regions & Office / Location(s)	Cortorate (Entire Region)
Selected Regions & Office / Location(s)	Corporate Benefits_Secure1
	Corporate Benefits_Secure2
	Corporate Honolulu

Approval

Approved By: Signature: Date: Requestor:

For MIS Dept. Use Only:

Received Request Date: Date Entered:
 VSSO Enabled: Yes: No: Entered by: