



User management
saif.com

Policyholder Administrator (PH Admin)



A PH Admin (like an officer of notice) has the **highest level of access**. There can be more than one PH Admin on a policy account.

PH Admins **can**:

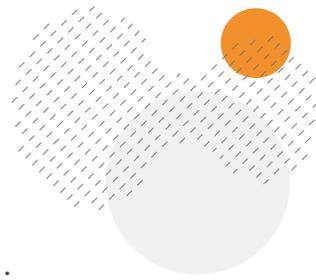
- Approve or deny access requests submitted by others
- Choose permissions when inviting other users to create a profile
- View active users with access to their policy account
- View and edit the permissions of all active users
- Grant PH Admin access to another user
- Resend an invite to a previously invited user, given that:
 - The user has not already registered
 - The invite is not older than 14 days

PH Admins **can not**:

- Modify their own permissions
- Delete/remove a user



User Management – User Management Administrator (UM Admin)



Choose permissions ×

Choose which permissions to grant **Barney Beakman**.

Grant admin access

Permissions

- View policy and claim information
- File payroll reports and make payments
- Create certificates of insurance

User management

- Manage users
- View users
- No access

User management permissions to manage other users on the policy

- There can be more than one UM Admin on a policy account.
- Only PH Admins and UM Admins can grant the UM Admin role to another user.
- A user must have at least one policy permission to have any UM permissions.
- A user with the “View users” UM permission **CAN**:
 - View active users with access to their policy
 - View active access requests
- A user with the “View users” UM permission **CAN NOT**:
 - Invite new users
 - Act on access requests
 - Modify user access
 - Delete/remove users

Permissions



Things to remember (Basic principles)

1. A user cannot edit their **own** permissions.
2. A user can only grant user management permission if they have it.
3. Policy permissions are independent of Rule 2.
4. UM Admins can grant users any policy permission, including ones they don't personally have.

✔ **MUST** have this permission

⊙ **MAY** have this permission

✘ **CANNOT** have this permission

N/A **Not Applicable** as a higher access level is assigned

Levels of access

Role	Policy permissions*			User management permissions		
	View policy and claim information	File payroll reports and make payments	Create certificates of insurance	Manage Users	View users	No access
Policy Admin (PH Admin)	✔	✔	✔	✔	N/A	N/A
User management administrator (UM Admin)*	⊙	⊙	⊙	✔	N/A	N/A
Non-admin Policyholder*	⊙	⊙	⊙	✘	⊙	⊙

*A registered user will always have at least one of the policy permissions

User management | Combination policies

The screenshot shows the 'Manage users' interface. At the top, there is a callout box stating: 'Policies associated with the Rate account can be accessed through the dropdown menu'. Below this, there is a green 'Invite user' button and a dropdown menu currently showing '867 [redacted] - Funky Flamingo Furnishings'. An arrow points from this dropdown to a separate window showing a search results list for '867 [redacted] - Funky Flamingo Furnishings'. The list includes items like '735 [redacted] - Merry Meerkat Merch', '801 [redacted] - Twisty Toucan Treasures', '238 [redacted] - Rambunctious Rhino Rugs', and '922 [redacted] - Lazy Lemur Linens'. Below the dropdown is a table of users.

Name	Email	Status	Actions
Milo Mango	milomango@site.com	Active	Edit
Crimson Crinklepuff	crimsoncrinklepuff@site.com	Invite sent	Review
Daisy Dumpling	daisydumpling@site.com	Invite sent	Review

- There can be more than one UM and PM Admins on all the policies a combination
- The following rules apply to combination policies:
 - Admins on the **rate account** (parent policy) can manage users and requests on both the parent AND any child policies associated with the rate account.
 - Admins on the child policy of a rate account can ONLY manage users and requests on the child account in which they are associated. These admins will not be able to access User Management for the parent policy or other child policies.



User management | Combination policies – Invite new user

Invite new user ×

Use the form below to add a user to your policy. They will receive an email with instructions to create their account.

Policy

8675309 - Funky Flamingo Furnishings ▼

First name

Last name

Email

Language preference English ▼

Use the dropdown to select the Rate account or child policy you'd like to invite the user to

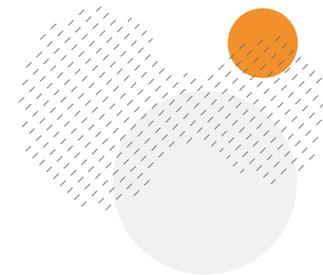
- When inviting users as the admin of the rate account, you can choose if the user should have access to the rate account (and in turn, all child policies) or access only to an associated child policy.
- Considerations when granting UM access within combination policies:
 - Users with UM access* on the **rate account** (parent policy) can see/manage users and requests on both the parent AND child policies associated with the rate account.
 - Users with UM access* on a **child policy** can only see/manage users that are associated with that specific child policy.

*UM access includes PH Admins, UM Admins, and "View only" users

How to access the User Management application?



The link to User Management is available in the Policyholder home page side menu or through My Account



User Management experience | PH Admin and UM Admin

The screenshot shows the SAIF user management interface. At the top left is the SAIF logo with the tagline "Work. Life. Oregon." Below it is a breadcrumb trail: "Home > My Account > User Management". An orange box with an arrow points to this trail, containing the text "Breadcrumbs for easy navigation".

The main heading is "Manage users" with a sub-heading "Invite, check the status of users on the account, and take action on pending requests." Below this is a green button labeled "Invite user" with a person icon. An orange box with an arrow points to this button, containing the text "Send invitations for users to create their profile".

On the right side, there is a box containing "867" followed by a small grid icon and the text "- Funky Flamingo Furnishings". An orange box with an arrow points to this area, containing the text "Your policy number and business name".

Below these elements is a table with the following columns: Name, Email, Status, and Actions.

Name	Email	Status	Actions
Flora Featherton	florafeatherton@site.com ✓	Active	Edit
Polly Periwinkle	pollyperiwinkle@site.com ✓	Invite sent	Review



User Management experience | PH Admin and UM Admin

saif Work. Life. Oregon.

Home ▶ My Account ▶ User Management

Manage users

Invite, check the status of users on the account, and take action on pending requests.

Invite user

867

Name	Email	Status	Actions
Flora Featherton	florafeartherton@site.com	Active	Edit
Polly Periwinkle	pollyperiwinkle@site.com	Invite sent	Review

Manage permissions for active users (Annotation pointing to the 'Active' status)

Take action on pending invites and requests (Annotation pointing to the 'Review' button)



User Management experience | View only access

saif Work. Life. Oregon.

Home ▶ My Account ▶ User Management

Manage users

Invite, check the status of users on the account, and take action on pending requests.

867 █████ - Funky Flamingo Furnishings.

Name ▾	Email ▾	Status ▲	Actions
Milo Mango	milomango@site.com ✓	Action required	
Flora Featherton	florafeatherton@site.com ✓	Active	
Polly Periwinkle	pollyperiwinkle@site.com ✓	Active	

Annotations:

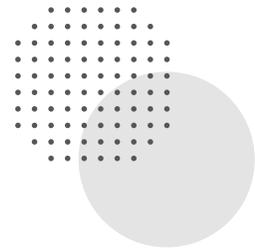
- Cannot send invites (points to the 'Invite' text)
- Cannot take action on users or requests (points to the 'Actions' column)



User status

Status	Description	Available Admin actions by status	
Active	User has created a profile on the account	Edit	View or modify a user's permissions and User Management access level
Invite sent	An invitation to register has been sent to this user within the last 14 days, but they have not yet completed registration	Review	Review the pending invite, modify the previously selected permissions, and resend the invitation.
Action required	This is a pending access/permissions request and needs attention from an admin	Review	Approve or deny the request Approve the access request with modifications to the user's selected permissions
Expired	An invitation to create a profile was sent >14 days ago to this user, which has now expired due to inaction	The invite will not be visible within User Management	

Review new requests



All new requests have the “Action required” status and are sorted at the top to grab the admin's attention.

Clicking “Review” opens a popup window to Edit, approve, or deny access requests.

Home ▶ My Account ▶ User Management

Manage users

Invite, check the status of users on the account, and take action on pending requests.

[+ Invite user](#) 867 - Funky Flamingo Furnishings

Name	Email	Status	Actions
Milo Mango	milomango@site.com	Action required	Review
Fiona Featherstone	fiona@furnishings.com	Active	+ Invite
Fully Featherstone	fully@furnishings.com	Active	+ Invite

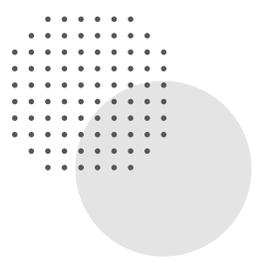
Approve access and permissions for new user

Click **Approve** to grant **Milo Mango** access with the following permissions:

- View policy and claim information
- File payroll reports and make payments

Click **Edit** to modify the permissions.

[Edit](#) [Deny](#) [Approve](#)



Administrator | Review new requests – Edit

 PH Admin | Edit permissions

Edit permissions

Choose which permissions to grant **Milo Mango**.

Grant admin access

Permissions

- View policy and claim information
- File payroll reports and make payments
- Create certificates of insurance

User management

- Manage users
- View users
- No access

Approve access and permissions for new user

Click **Approve** to grant **Milo Mango** access with the following permissions:

- View policy and claim information
- File payroll reports and make payments

Click **Edit** to modify the permissions.

 UM Admin | Edit permissions

Edit permissions

Choose which permissions to grant **Milo Mango**.

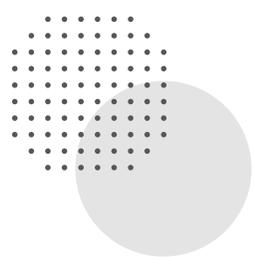
Permissions

- View policy and claim information
- File payroll reports and make payments
- Create certificates of insurance

User management

- Manage users
- View users
- No access

Please note: The “Grant admin access” toggle is **ONLY** visible to PH Admins.



PH Admin | Edit permissions | New requests & existing users

Edit permissions ×

Choose which permissions to grant **Milo Mango**.

Grant admin access

Permissions

- View policy and claim information
- File payroll reports and make payments
- Create certificates of insurance

User management

- Manage users
- View users
- No access

Granting admin access to a user gives them full administrative rights to the entire policy account. However, they will need additional permission to view claims notes.

Hovering your cursor over the "Grant admin access" toggle will reveal an advisory message, helping understand the importance of the role before granting it to others.

Manage users | Review new requests – Approve



1

Approve access and permissions^x for new user

Click **Approve** to grant **Milo Mango** access with the following permissions:

- View policy and claim information
- File payroll reports and make payments

Click **Edit** to modify the permissions.

Edit **Deny** **Approve**

1. The admin clicks approve to accept the request without editing the permissions.

2

Hello Milo,

Your request for access was accepted. You can now create your SAIF profile to access policy information, including claims, payments, and payroll.

Create your profile

We are here to help! If you have questions or concerns about your policy, contact SAIF at [800.285.8525](tel:800.285.8525) or email [customer support](#).

Thank you,

SAIF

2. The user gets an email with an invitation link to create their profile.

3

Get Started

Policy number *
Your policy number is between 4 to 10 digits.

9 9 9 9 9 9 9 9 9 9

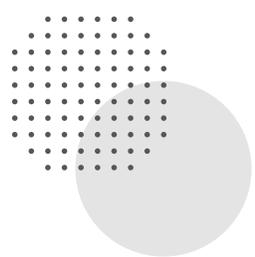
Email *
Please use the email your registration email was sent to. All communication will be sent to this email. Because you are an employer, use your work email not a personal email.

I certify that I am authorized to view information on behalf of this company. *

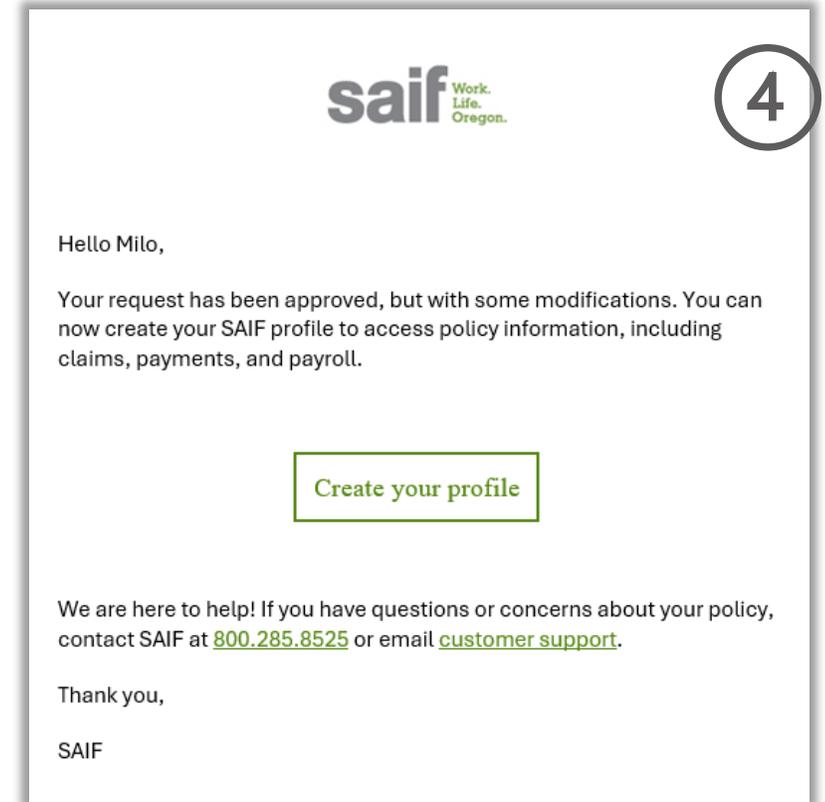
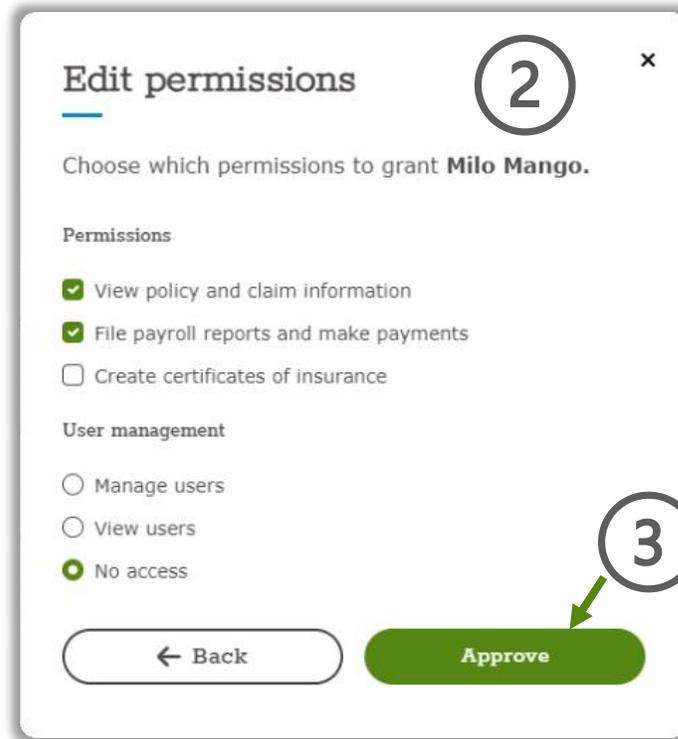
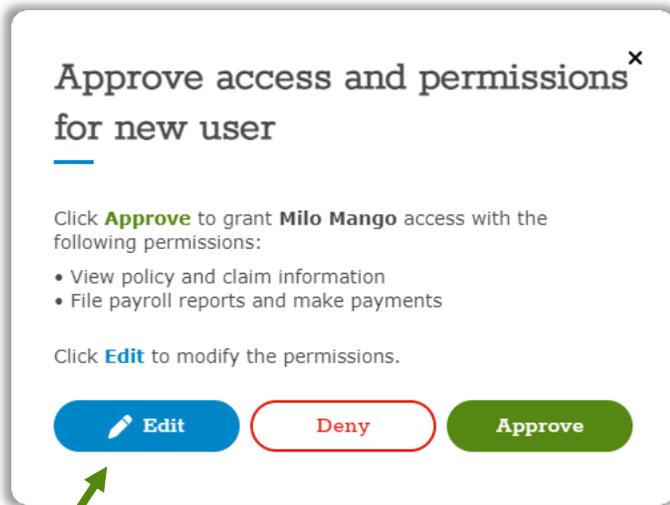
I have a workers' comp claim with SAIF for this policyholder or I am related to someone who has a workers' comp claim with SAIF for this policyholder.

Get Started

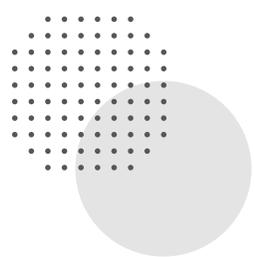
3. The registration process starts.



Manage users | Review new requests – Approve with edited permissions



1. The admin clicks “Edit” to modify the permissions.
2. Edits permissions as needed
3. Clicking “Approve” closes the pop-up
4. The user receives an email with an invitation link to start the registration process.



Manage users | Review new requests – Deny

Approve access and permissions^x for new user

Click **Approve** to grant **Milo Mango** access with the following permissions:

- View policy and claim information
- File payroll reports and make payments

Click **Edit** to modify the permissions.

1

Edit **Deny** **Approve**

1. The admin clicks “Deny”



2

Hello Milo,

Your request for access was denied. If you believe this was sent in error, please contact your administrator.

We are here to help! If you have questions or concerns about your policy, contact SAIF at [800.285.8525](tel:800.285.8525) or email [customer support](mailto:customer.support).

Thank you,

SAIF

2. The user receives an email informing them about the denial.



Invite new user | User information

Invite new user ×

Use the form below to add a user to your policy. They will receive an email with instructions to create their account.

Policy number and business name cannot be changed

Policy
867 - Funky Flamingo Furnishings

First name

Last name

Choose English or Spanish as the preferred language for the user being invited

Email

Language preference

Select 'Next' to choose the user's permissions



Invite new user | Choose permissions



Choose permissions

Choose which permissions to grant **Barney Beakman**.

Grant admin access 1

Permissions 2

View policy and claim information

File payroll reports and make payments

Create certificates of insurance

User management 3

Manage users

View users

No access

[← Back](#) [Send Invite](#)

Choose permissions

Choose which permissions to grant **Barney Beakman**.

Grant admin access 1

Permissions

View policy and claim information

File payroll reports and make payments

Create certificates of insurance

User management

Manage users

View users

No access

[← Back](#) [Send Invite](#)



- A PH Admin can use the “Grant admin access” toggle (1) to give another user the same privileges as their own.
- Note that both the “Permissions” (section 2) and “User management” (section 3) are greyed out when the “Grant admin access” toggle is enabled. This is due to PH Admins being granted all permissions by default.

Invite new user | Choose permissions – PH Admin

Choose permissions ×

Choose which permissions to grant **Barney Beakman**.

Grant admin access **1**

Permissions

- View policy and claim information **2**
- File payroll reports and make payments
- Create certificates of insurance

User management

- Manage users **3**
- View users
- No access

4

1. A PH Admin can choose individual permissions by ensuring “Grant admin access” is toggled **off**.
2. Permissions in section two are policy-related and can be chosen individually. At least **one** of these permissions must be selected to enable the “Send invite” button (4)
3. Permissions in section three dictate the user’s access level to User Management. Only **one** of these permissions may be selected. Please refer to [Slide 3](#) for more details about the permissions associated with the various access levels.
4. Once the desired permissions are selected, select “Send invite” to send the invite. The invite will be delivered to the email address provided in the previous invite step.

Admin | Invitation email and “Manage users” page

New user invitation



Hello Milo,

You can now create a profile with your SAIF account. Use your profile to access SAIF policy information, including claims, payments, and payroll.

[Create your profile](#)

We are here to help! If you have questions or concerns about your policy, contact SAIF at [800.285.8525](tel:800.285.8525) or email [customer support](#).

Thank you,
SAIF

Admin's UM landing page

Manage users

Invite, check the status of users on the account, and take action on pending requests.

[+ Invite user](#) 867 - Funky Flamingo Furnishings

Name	Email	Status	Actions
Barney Beakman	barneybeakman@site.com	Invite sent	Review

- The admin lands on the “Manage users” page.
- The list contains the recently sent invites.
- The admin can use the “Review” button to modify the permissions and resend* a new invitation link if the following conditions are true:
 - The invited user has not registered
 - The invite was sent less than 14 days ago

*If an invite is resent, the previously sent link will become invalid

Admin | Invitation email and “Manage users” page

Manage users

Invite, check the status of users on the account, and take action on pending requests.

[+ Invite user](#) 8675309 - Funky Flamingo Furnishings

Name	Email	Status	Actions
Milo Mango	milomango@site.com	Active	Edit

Once they've completed registration using the invite, the user's status will change to **Active**

UM Admin | “Manage users” page

UMAdmin’s “Manage users” page

Manage users

Invite, check the status of users on the account, and take action on pending requests.

Invite user

867 - Funky Flamingo Furnishings

UM Admin cannot modify permissions of PH Admins

Name	Email	Status	Actions
Milo Mango	milomango@site.com ✓	Active	Edit
Barney Beakman	barneybeakman@site.com ✓	Active	
Polly Periwinkle	pollyperiwinkle@site.com ✓	Active	
Lola Lemonade	lolalemonade@site.com ✓	Active	Edit
Daisy Dumpling	daisydumpling@site.com ✓	Invite sent	Review
Crimson Crinklepuff	crimsoncrinklepuff@site.com ✓	Invite sent	Review

- Note that the “Edit” button is not present in the last few rows. This indicates that the signed-in user (UM Admin) does not have the necessary permissions to modify the access level for those users, as they are “PH Admins”

Admin | “Manage users” page | Denied status



An administrator's “Manage users” page

The screenshot shows the 'Manage users' interface. At the top, there is a green 'Invite user' button. Below it, a table lists users. The first user is 'Milo Mango' with email 'milomango@site.com'. The 'Status' column for this user shows 'Denied' in a red box. To the right of the table, there is a blue 'Review' button. The page title is 'Manage users' and the subtitle is 'Invite, check the status of users on the account, and take action on pending requests.'

Name	Email	Status	Actions
Milo Mango	milomango@site.com	Denied	Review

- Denied requests are displayed for the duration of the current session. They will be removed from the list once the page is refreshed.



Policyholder | User management | “No access”

The screenshot shows a web application interface for policyholders. On the left is a navigation menu with the following items: FAVORITES, ALL APPLICATIONS (Certificates, Claim Profile, Claim Reports, Dividends, ND Claims Reimbursement, Pay Online, Policy Changes), Policyholder Portal (Home, Recent Documents, Policy Documents, Notifications, My Account), Policyholder Profile, Report Payroll, and Resources. The 'Policyholder Portal' section is expanded, and the 'Home' sub-section is highlighted in green. A callout box with an orange border and arrow points to the 'User management' option, which is missing from the menu. The callout text reads: "User management" is not available for policyholders with "No access".

The main content area features a banner for "TOP TEN SAFETY TIPS" with a man pointing. Below the banner are sections for Messages, News, and a note about the news feed being temporarily unavailable.

- The registered policyholders with “No access” to user management will not see the “User management” option in the left-hand navigation.