Adding a user to a plan or plan group

If you would like another Account user to have access to your plan or plan group, and all of the related disclosures and consolidations, you need to add the user to your plan or group. You can assign an existing Account user to your plan/group, or add a new system user and assign them to your plan/group.

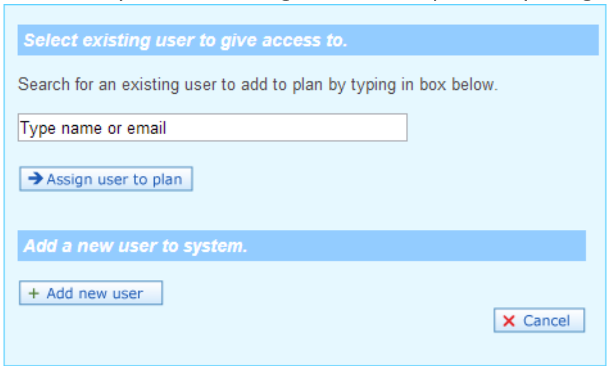
How to add a user to a plan or plan group

1. In the **Select client account/plan** on the left, click on the Client Account name to view all plans and plan groups associated with that client.

2. Still in the **Select client account/plan**, click on the name of the plan or plan group to which you would like to add a user.

3. Go to the panel titled **Users with access to plan** (or **Users with access to plan group**). You will see a list of users that already have access to the plan or group.
   - For plans: click + Add user to plan
   - For plan groups: click + Add user to plan group

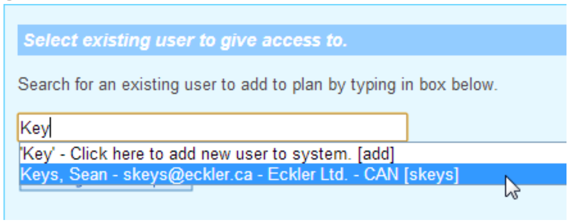
   Whether you are adding a user to a plan or plan group, the following panel will appear:

The next steps depend on whether or not the user already has an Account profile.

Assigning existing Account users to your plan/group

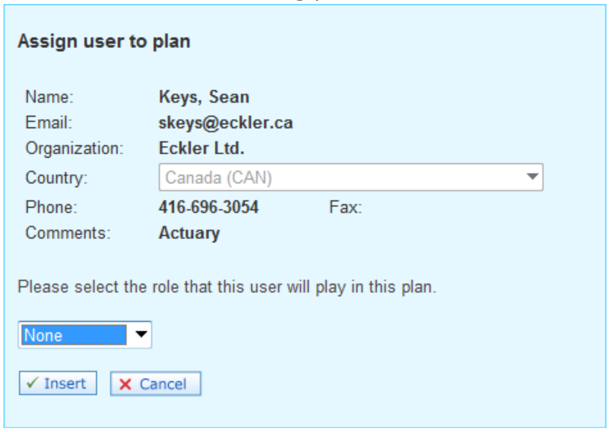
1. You can check to see if the user already has an Account profile by typing the first few letters of the person's last name, first name or email address in the text box under **Select existing user to give access to**:

2. If the person has a profile in the system, click on their name to select it as shown above, and then click Assign user to plan.

   (If you are adding the user to a plan group, click Insert.)

3. You will see the following panel:

   The user's profile information is summarized at the top. To assign the user to the plan, you must select the role that the user will play from the following three options:
   - **Lead Actuary:** Lead actuaries have the greatest degree of administrative rights within the plan or plan group. They are able to:
     - Create new disclosures
     - View disclosures/consolidations
     - Edit disclosures/consolidations
     - Delete disclosures/consolidations
     - Edit the plan or plan group information
     - Delete the plan or plan group entirely
   - **Local Actuary:** Local actuaries have all of the same rights as lead actuaries, except:
     - They cannot delete disclosures/consolidations
     - They cannot edit the plan or plan group information
     - They cannot delete the plan or plan group.
   - **Client:** Client users have read-only access to the disclosures/consolidations in the plan/group.

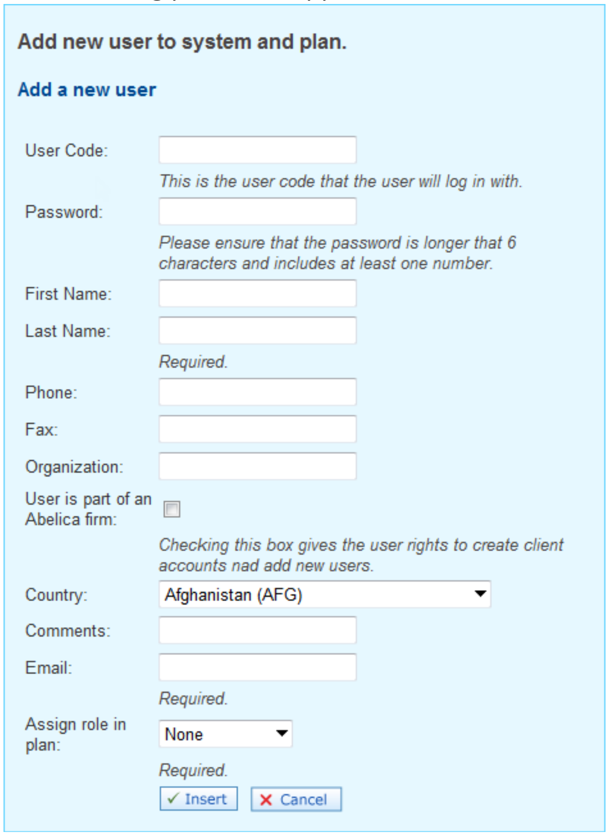
   When you have selected the user's role within the plan, click Insert to assign the user to the plan.

Adding a new system user to your plan/group

1. If the user does not already have an Account profile, you can set one up by clicking + Add new user.

   (If you are adding the new user to a plan group, click Insert beneath the heading **Add a new user to system**.)

2. The following panel will appear:



Fill in the details for the new user, keeping in mind:

- Not all fields are required, but you must provide the following:
  - User Code (i.e. a username for the new user)
  - Password
  - Last Name
  - Email address
  - Role within plan (i.e. Lead Actuary, Local Actuary or Client, as described above)
- If you click the checkbox labelled “User is part of an Abelica firm”, you are giving the user additional administrative rights (the ability to add new client accounts and new users). Even if you assign the person with a “client” role, if they are part of an Abelica firm, the user will maintain all the rights of a Local Actuary.

3. When you have completed the above fields, click ✓ Insert to create the new user profile and assign the user to the plan or plan group.