



How To:

Add a User in User Access Management

Applies To Policy Administrators	Section User Access Management	Last Updated 2026
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Overview

This guide walks Policy Administrators through granting portal access to a new or existing Pono 'Oe user. The Grant Access feature allows you to either create a brand new Pono 'Oe account for someone or add access to an existing account for additional Groups, Accounts, and permissions.

 *Black boxes in screenshots are used to redact internal Group/Account identifiers and Personally Identifiable Information (PII).*

Before You Begin

Before you start, confirm that you have the required access and user information.

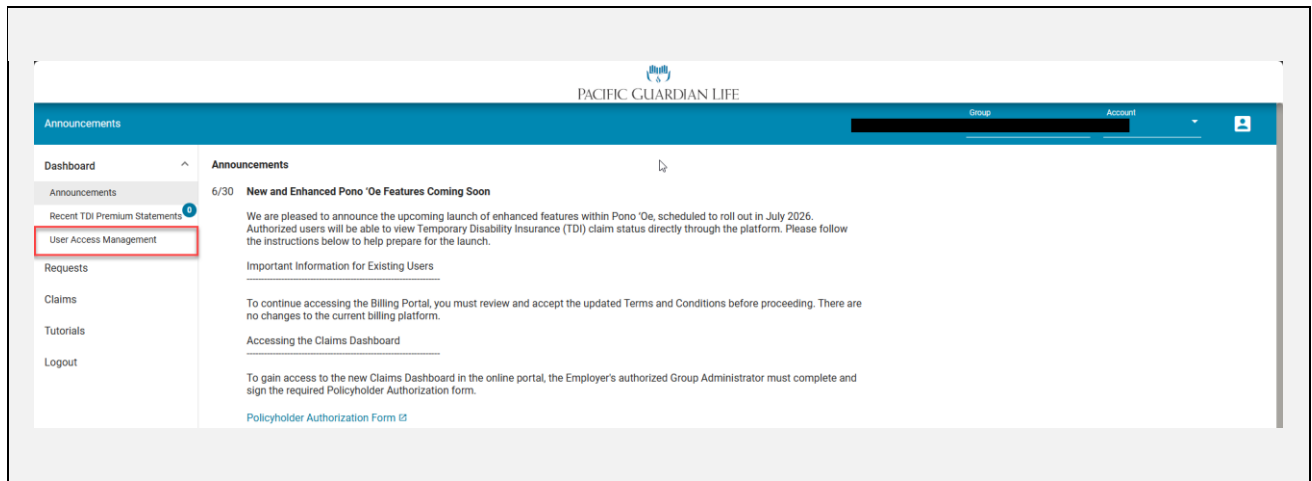
- **Administrator access:** Log in to Pono 'Oe using an account with Policy Administrator permissions.
- **User details:** Have the user's first name, last name, and email address ready.
- **Access assignment:** Confirm the Group, Account, and permissions the user should receive.

Steps

1

Navigate to User Access Management

Log in to Pono 'Oe and click User Access Management in the left navigation bar to open the user list.



2

Click Grant Access

On the User Access Management screen, click the Grant Access button in the top right corner. A form will appear for you to complete.

The screenshot displays the Pacific Guardian Life User Access Management interface. The top navigation bar includes the Pacific Guardian Life logo and a user profile dropdown. The left sidebar lists various navigation options: Dashboard, Announcements, Recent TDI Premium Statements, User Access Management, Account Management, Requests, Claims, Tutorials, and Logout. The main content area is titled 'All Users' and features a search bar, a 'Group' dropdown, and an 'Account' dropdown. A red arrow points to the 'Grant Access' button in the top right corner of the main content area. Below the search bar is a table with columns for ID, Email, First Name, Last Name, and Date Added. The table contains 12 rows of user data. At the bottom of the page, there is a footer with copyright information and a 'Main Switchboard' link.

ID	Email	First Name	Last Name	Date Added
30				06/26/2020
31				07/01/2020
39				02/02/2026
50				03/11/2026
51				03/24/2026
53				03/30/2026
61				04/07/2026
62				04/07/2026
63				04/07/2026
84				06/02/2026

3

Enter the User's Details

Complete the form with the following information: First Name, Last Name, and Email Address. The email address will serve as the user's username.

Grant Access

First Name*

PGL

3/500

Last Name*

USER

4/500

Email Address*

PGLTESTACCOUNT@GMAIL.COM

24/500

Group

I

Account*

Choose a group number.

Module	View	Update
Claims	☐	☐
Billing	☐	☐

Cancel

Create

4

Select the Group and Account

From the Group and Account dropdowns, select the Group and Account you would like to grant the user access to. These options are filtered to only show the Groups and Accounts you administer.

Grant Access

First Name*

PGL

3/500

Last Name*

USER

4/500

Email Address*

PGLTESTACCOUNT@GMAIL.COM

24/500

Group

Account*

Choose a group number.

Module	View	Update
Claims	☐	☐
Billing	☐	☐

Cancel

Create

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Select the Permission Sets

Select the appropriate permissions for this user based on their role. The available permission areas are Claims and Billing. Refer to the Pono 'Oe User Guide for a full description of each permission.

Module	View	Update
Claims	☒	☒
Billing	☐	☐

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Click Create

Click the Create button to submit. One of two outcomes will occur based on whether the email address is already associated with a Pono 'Oe account.

Grant Access

First Name*

PGL

3/500

Last Name*

USER

4/500

Email Address*

PGLTESTACCOUNT@GMAIL.COM

24/500

Group

Account*

Module	View	Update
Claims	☒	☒
Billing	☐	☐

Cancel

Create

7A

New Pono 'Oe User

If the email address is not associated with an existing Pono 'Oe account, the user will receive a **Welcome to Pono 'Oe** email and a **New Access Notification** email. These emails will confirm that the account has been created and will include the permissions assigned, as well as the Group and Account they now have access to. The user will then appear in your User Access Management list.

PACIFIC GUARDIAN LIFE

User Access Management

Group Account

Dashboard

- Announcements
- Recent TDI Premium Statements
- User Access Management
- Account Management
- Requests
- Claims
- Tutorials
- Logout

All Users

Search: PGL USER

Group: Account: Reset Filters Grant Access

Press enter to search. Choose a group number.

ID	Email	First Name	Last Name	Date Added
2100	PGLTESTACCOUNT@GMAIL.COM	PGL	USER	06/10/2026

Items per page: 10 1 - 1 of 1

Account Information Show

Build Information What is this?

Ref: develop-887
 Build Date: 06/08/2026 10:02 AM
 Commit: 56542023c945cc1aee4cc9c...
 Privacy Policy
 Copyright © 2026. All rights reserved.

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7B

Existing Pono 'Oe User

If the email address is already associated with an existing Pono 'Oe account, the user will receive a **New Access Notification** email confirming the permissions that have been added, as well as the Group and Account they now have access to. The user will then appear in your User Access Management list.

Access Granted

User Account already exists. Policy permissions added to existing account.

Close

TIP

Double check the email address before clicking Create. If the email address is entered incorrectly, a new account may be created unnecessarily. If this happens, contact Pacific Guardian Life for assistance.

Related Guides

- Need more help? View our full library of how-to guides [here](#).

Need Further Assistance?

If you have any questions, please contact us:

TDI Portal Team

Email: TDIportal@pacificguardian.com

TDI Claims Team

Email: TDIclaims@pacificguardian.com