How To:

Edit or Remove a User in User Access Management

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

Overview

This guide walks Policy Administrators through editing a user’s name or email, updating their permissions, adding access to additional Groups and Accounts, and removing a user’s Group and Account access.

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

Before You Begin

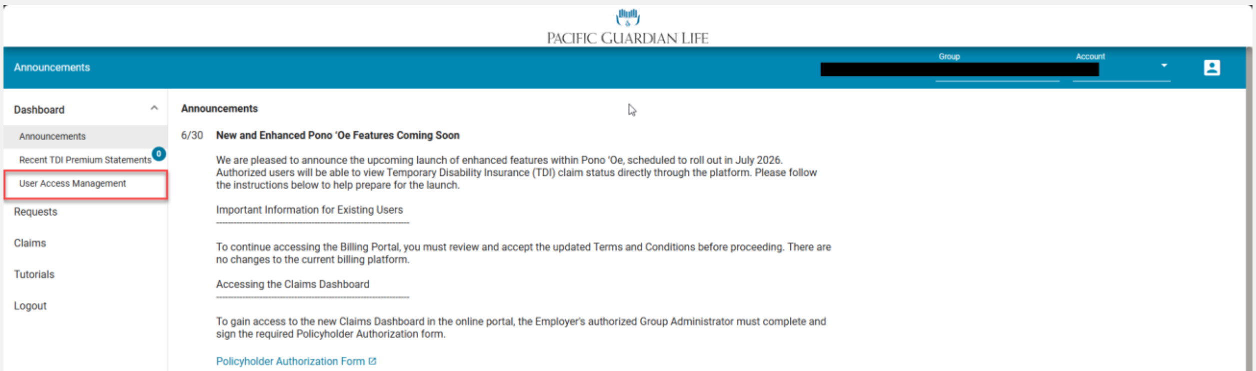
Before you start, confirm that you have the required access and user information.

- **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.

Workflow 1: Finding a User

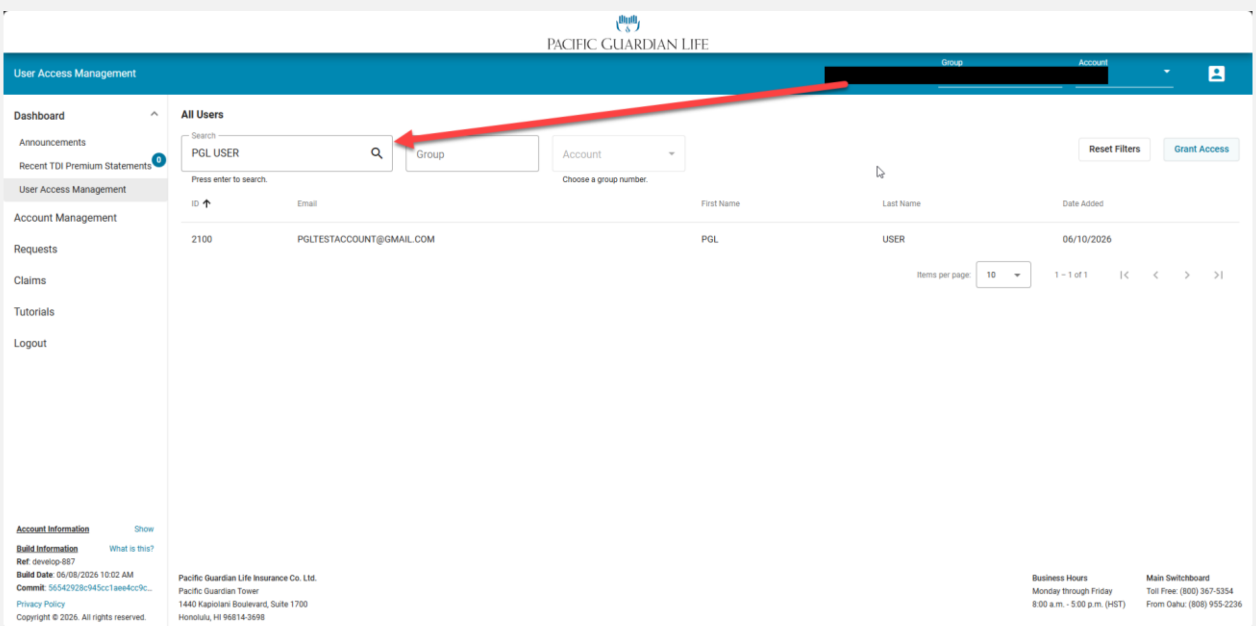
1.1 Navigate to User Access Management

Log in to Pono ‘Oe and click User Access Management in the left navigation bar.



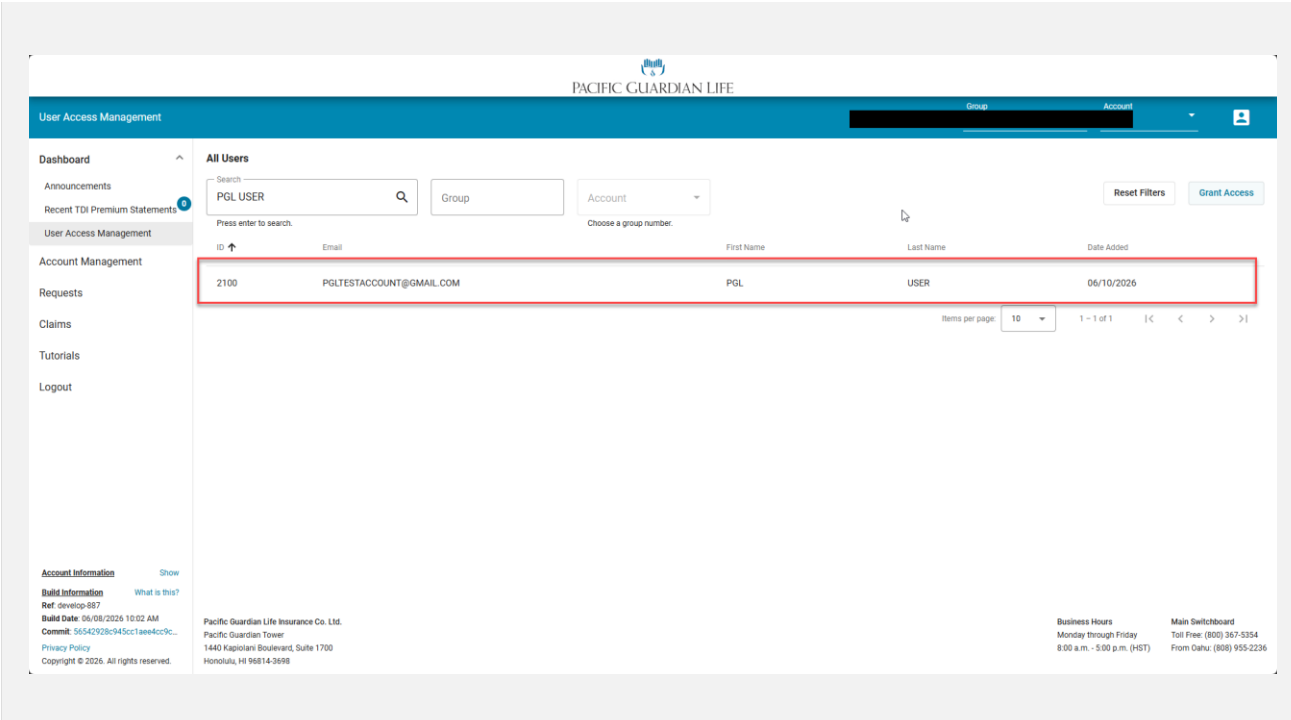
1.2 Search for the User

Use the search bar at the top of the user list to locate the user you need to update. You can search by the user’s email address or by their first and last name.



1.3 Click on the User Record

Click on the user’s record to open their detailed view.


PACIFIC GUARDIAN LIFE
User Access Management
Group
Account
[redacted]
Dashboard
Announcements
Recent TDI Premium Statements
User Access Management
Account Management
Requests
Claims
Tutorials
Logout
All Users
Search
PGL USER
Press enter to search.
Group
Account
Choose a group number.
Reset Filters
Grant Access
ID
Email
First Name
Last Name
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PGLTESTACCOUNT@GMAIL.COM
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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
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Honolulu, HI 96814-3698
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Main Switchboard
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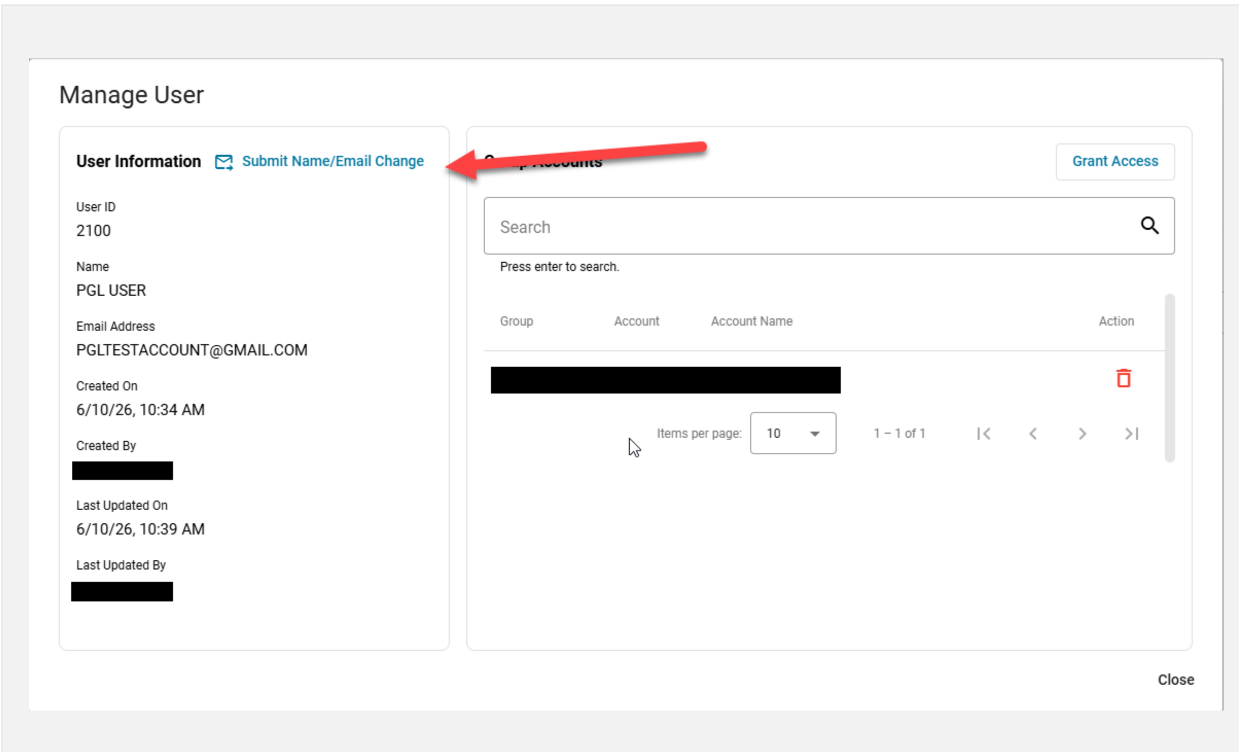
Workflow 2: Submitting a Name or Email Change

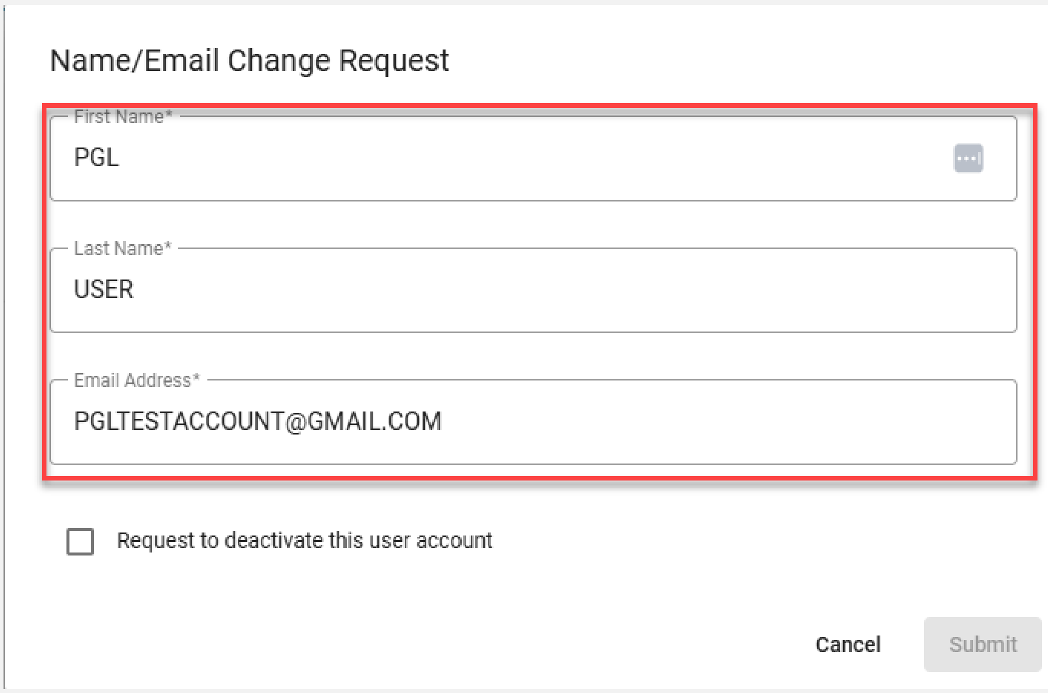
Name and email address changes cannot be made directly in the portal. Instead, a change request is submitted to Pacific Guardian Life for processing.

2.1	**Click Submit Name/Email Change** Within the user’s detailed view, click the Submit Name/Email Change button. A form will open pre-populated with the user’s current First Name, Last Name, and Email Address.



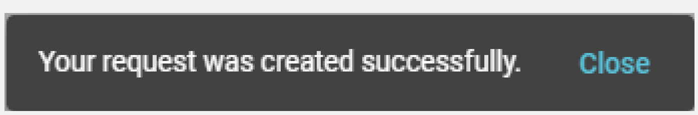
2.2 Update the Desired Fields

Make the necessary changes to the First Name, Last Name, and/or Email Address fields as needed.



2.3 Click Submit

Click Submit to send the request to Pacific Guardian Life. Both you and Pacific Guardian Life will receive an email confirming the request has been created. The user will receive an email notification once their information has been updated.

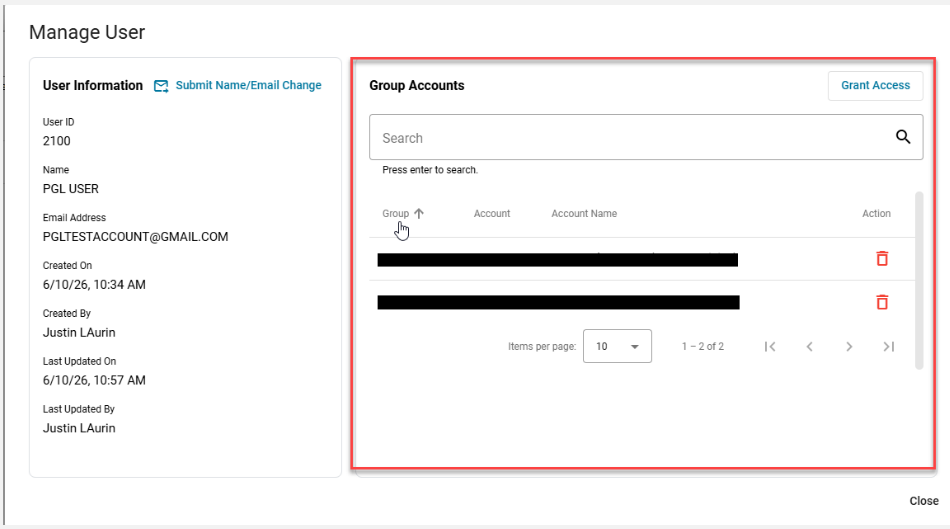


NOTE Name and email changes are processed by Pacific Guardian Life and will not reflect immediately in the portal. Please allow 1–2 business days for updates to appear.

Workflow 3: Editing a User’s Permissions

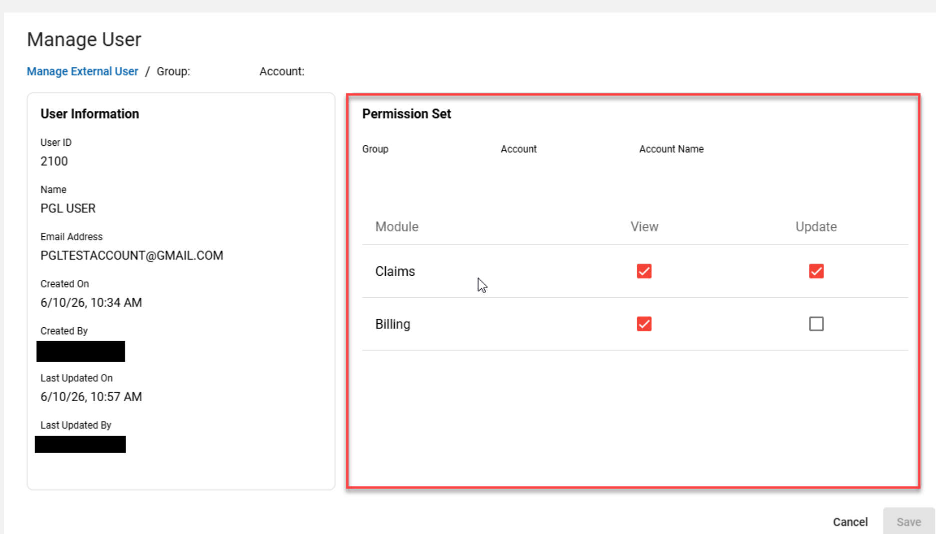
3.1 Locate the Group Accounts Section

Within the user’s detailed view, scroll to the Group Accounts section. This displays all Groups and Accounts you administer that the user currently has access to.



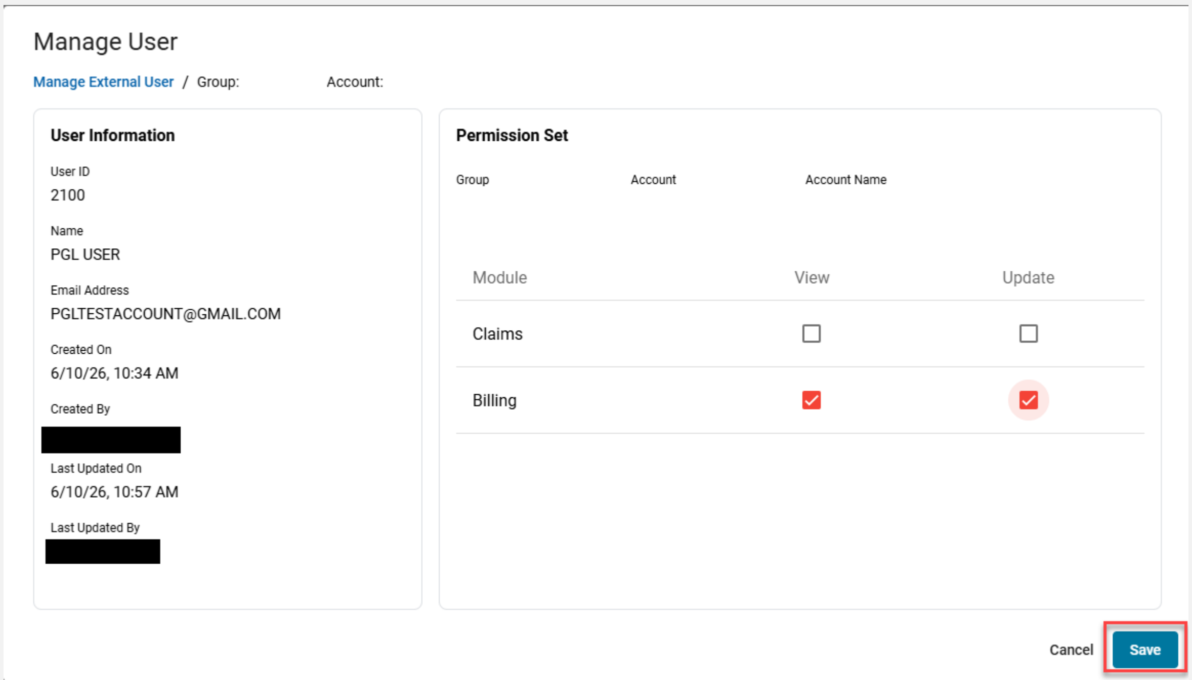
3.2 Click the Group/Account Record

Click on the Group or Account record whose permissions you would like to update. The current permission set for that Group and Account will be displayed.

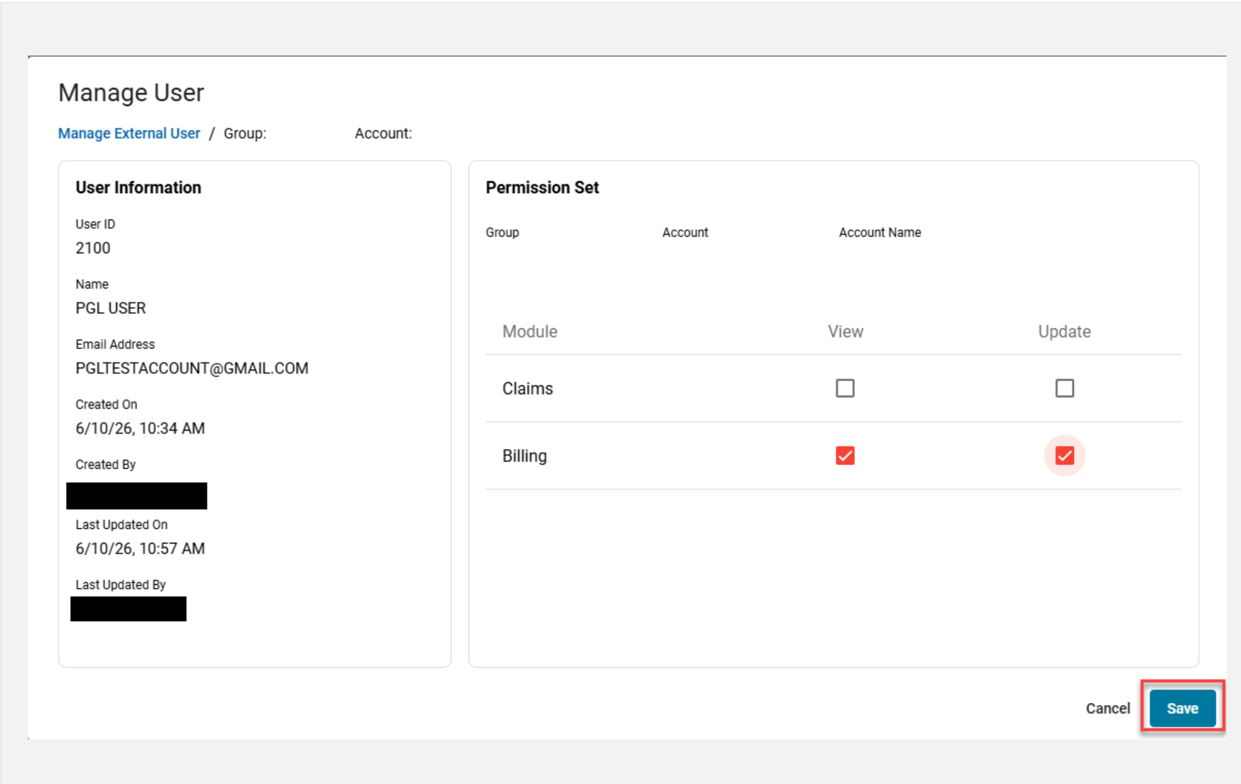


3.3 Check or Uncheck Permissions

Select or deselect the appropriate permissions (Claims, Billing) based on what the user should have access to.



3.4	**Click Save** Click Save to apply the changes. The updated permissions will take effect immediately. Note that the user may need to log out and log back in to see the changes reflected in their portal.



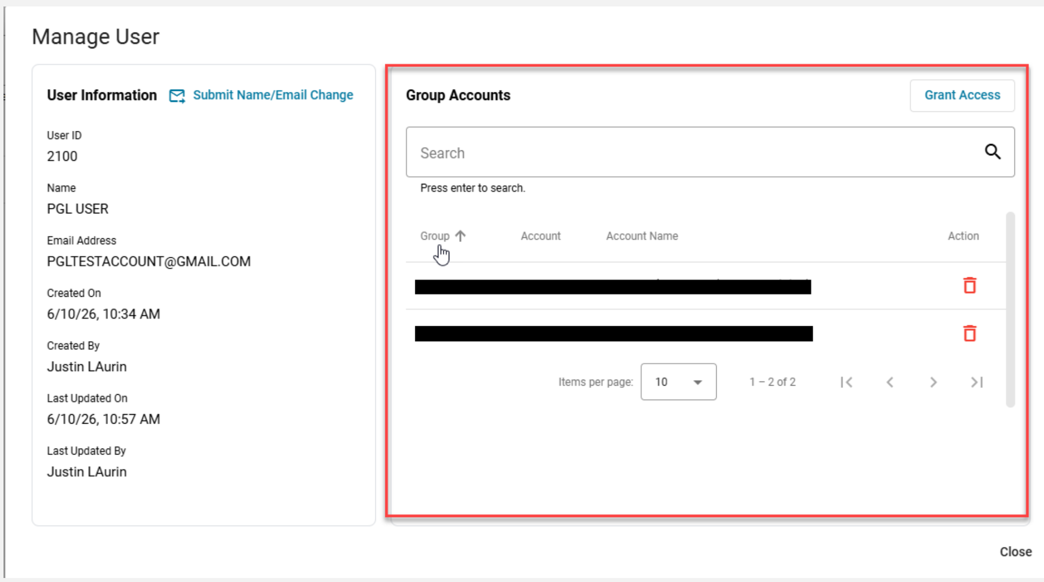
TIP	If a user reports that their permissions do not appear to have changed, ask them to log out of Pono ‘Oe and log back in. Permission changes take effect immediately on the system but may require a fresh session to display correctly.

Workflow 4: Adding Access to an Additional Group or Account

If a user needs access to an additional Group or Account that you administer, you can add it directly from within their detail view without having to use the Grant Access flow.

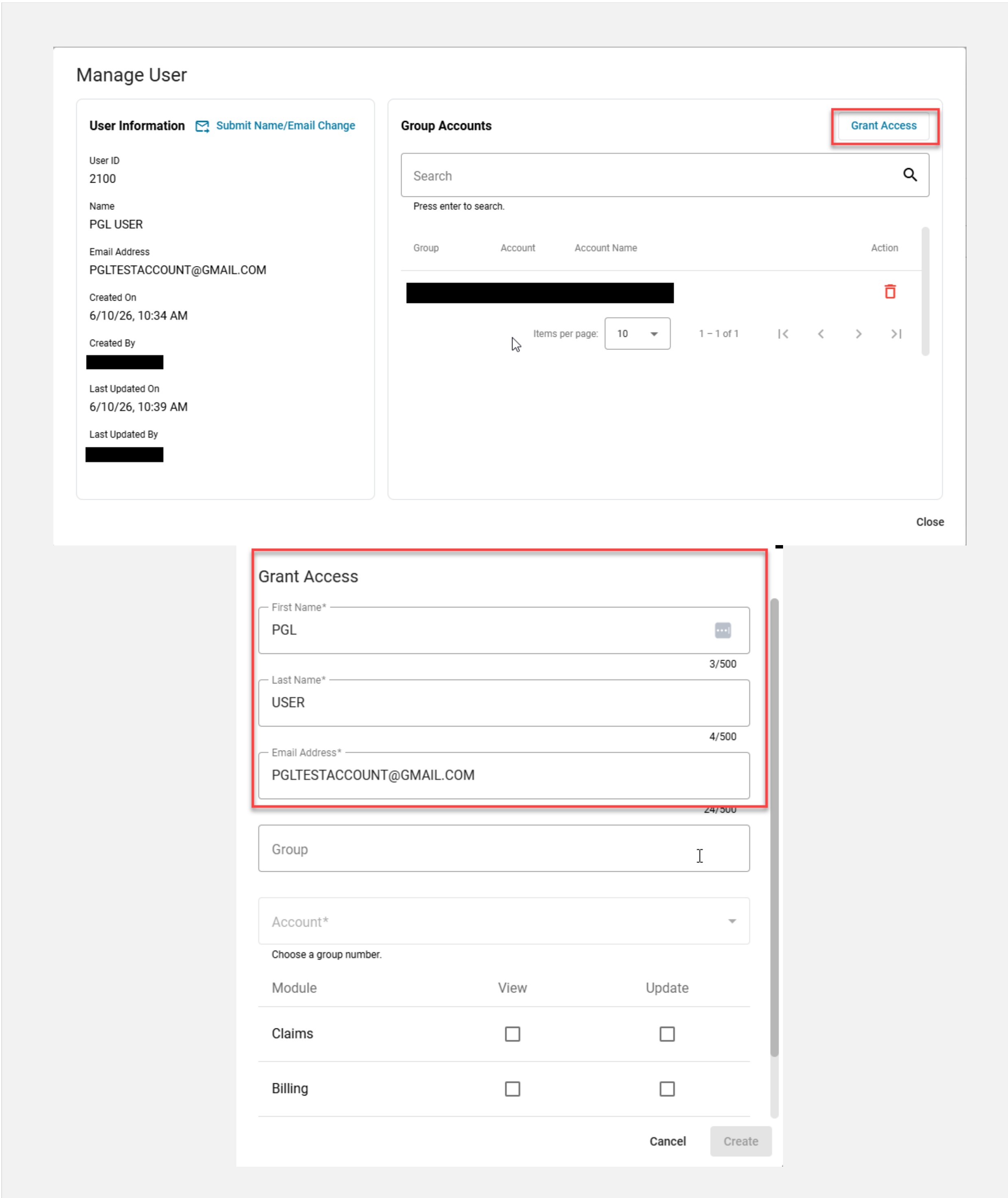
4.1 Locate the Group Accounts Section

Within the user’s detail view, scroll to the Group Accounts section.



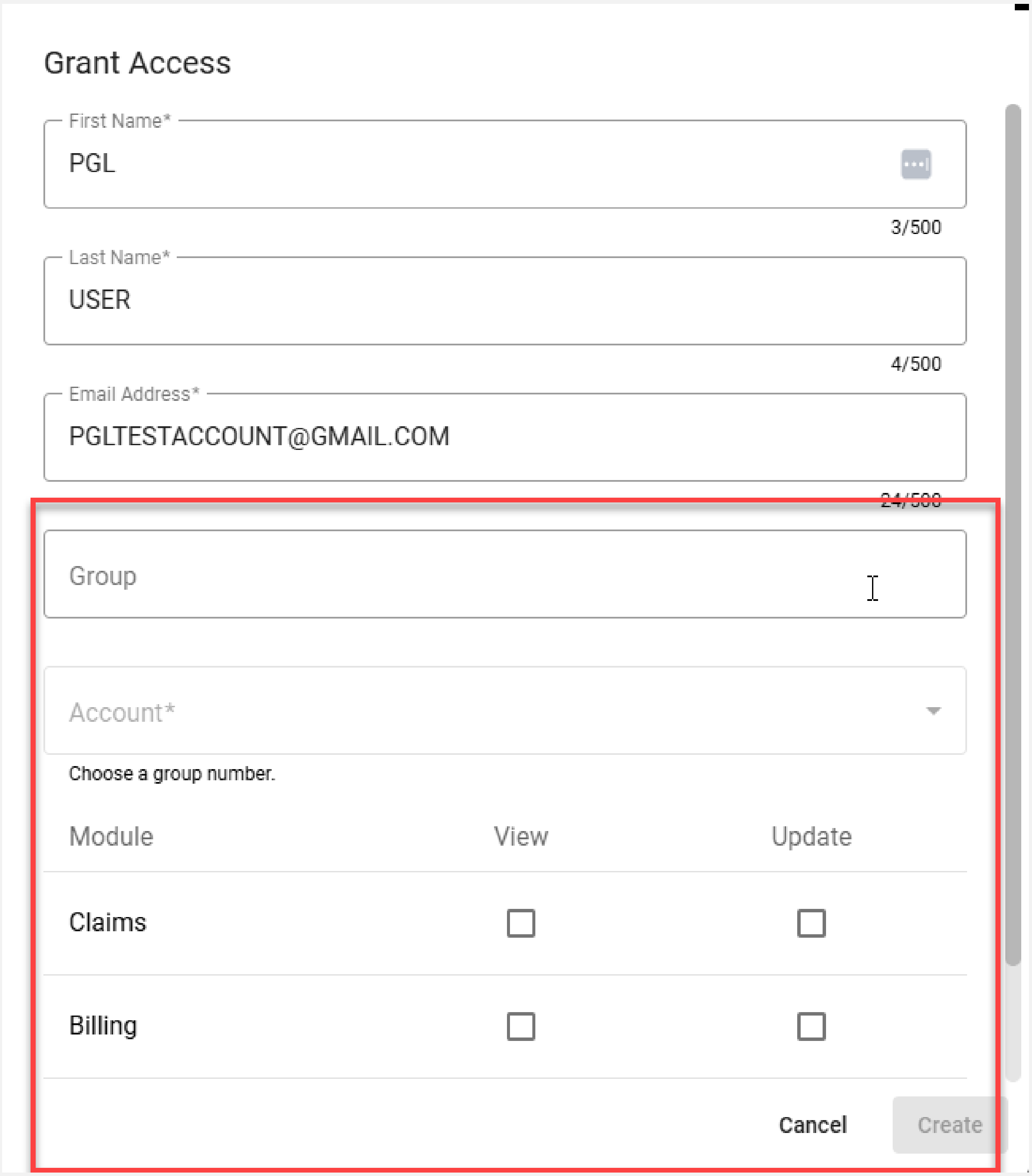
4.2 Click Grant Access

Click the Grant Access button within the Group Accounts section. Unlike the main Grant Access button, this form only requires you to select the Group and Account and assign the appropriate permissions — the user’s details are already filled in.

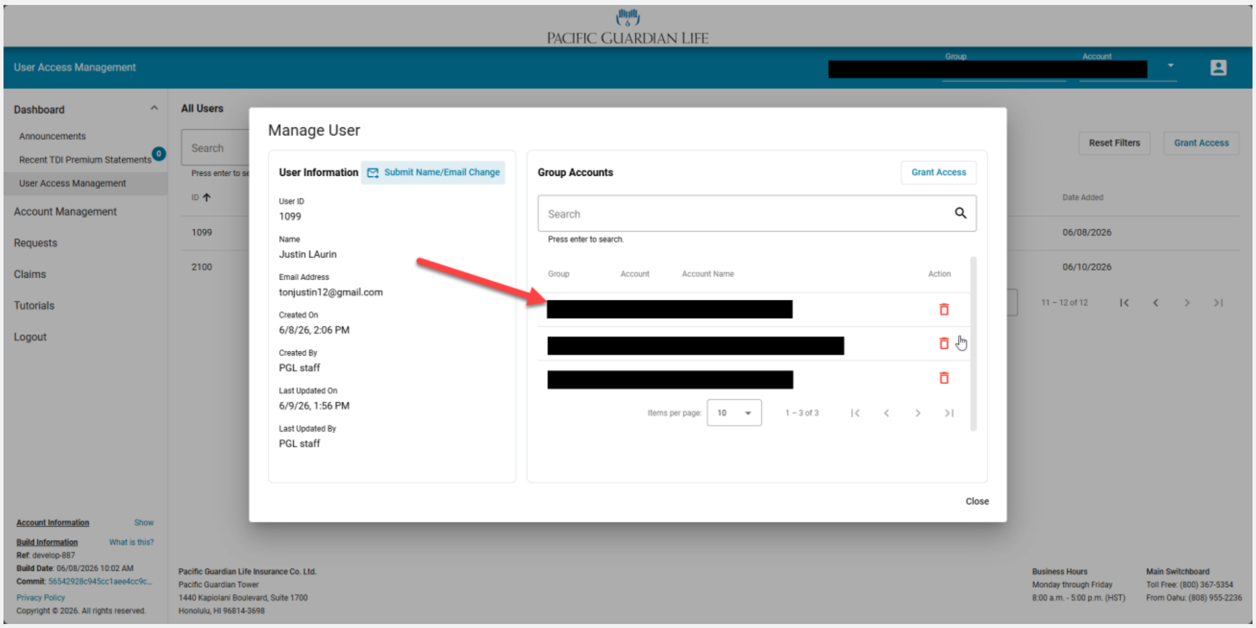


4.3 Select the Group, Account, and Permissions

Choose the Group and Account you would like to grant the user access to, then select the appropriate permission sets.



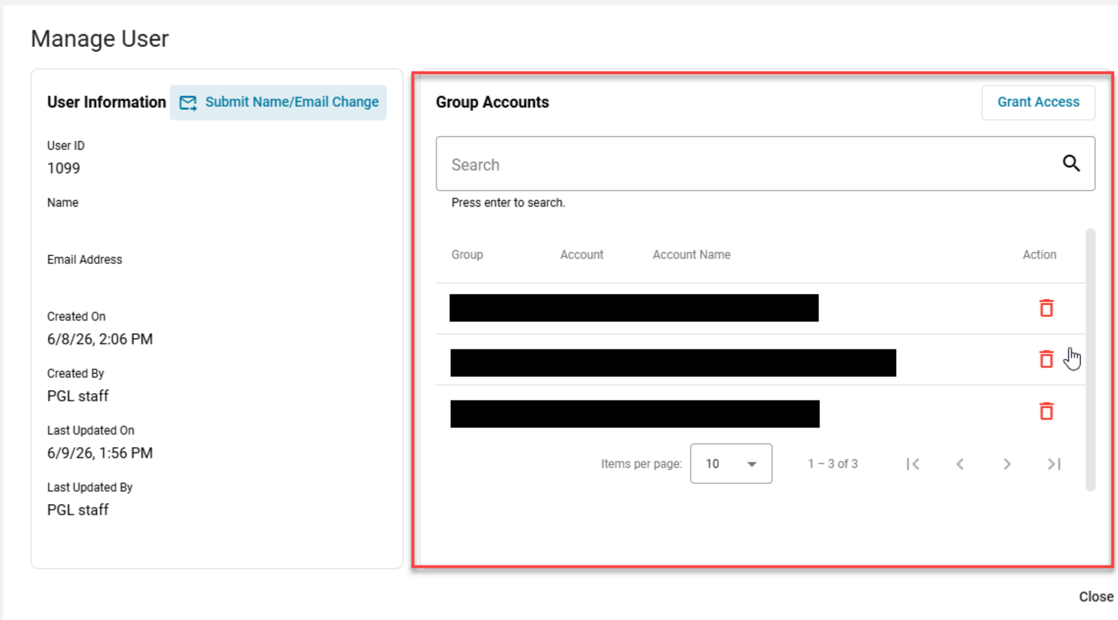
4.4	**Click Save** Click Save. The new Group and Account record will appear in the Group Accounts section of the user’s detail view.



Workflow 5: Removing a User’s Group or Account Access

5.1 Locate the Group Accounts Section

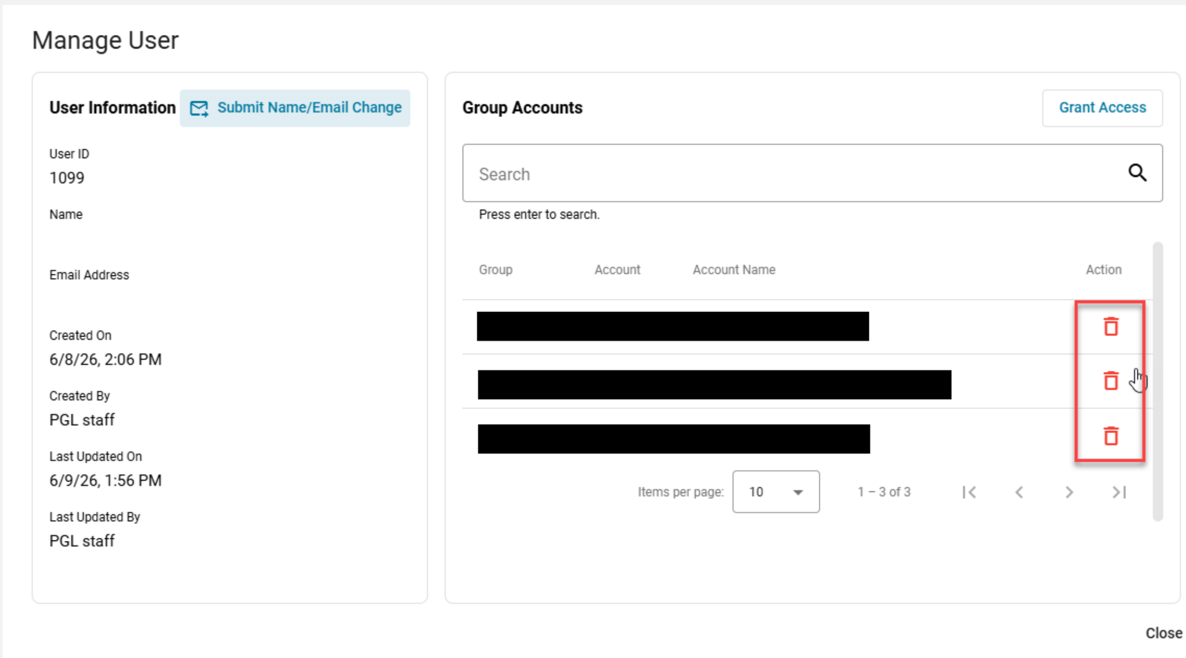
Within the user’s detail view, scroll down to the Group Accounts section and locate the Group or Account record you wish to remove.



5.2

Click the Trash Can Icon

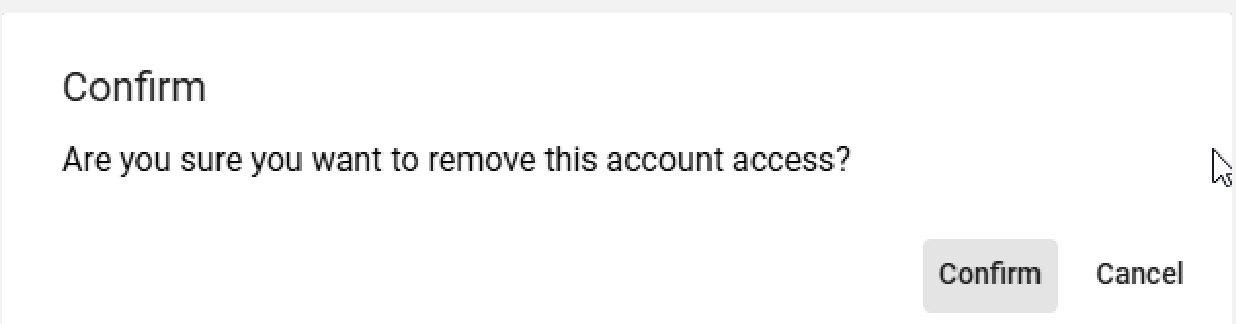
Click the trash can icon on the Group or Account record you want to remove. A confirmation message will appear asking you to confirm the removal.



5.3

Confirm the Removal

Confirm the removal in the dialog. The user’s access to that Group and Account will be revoked immediately.



NOTE	If the user no longer has access to any Groups or Accounts that you administer, their profile will no longer appear in your User Access Management list. Their account may still exist if they have access to other Groups and Accounts managed by a different Policy Administrator.

Need Further Assistance?

If you have any questions, please contact us:

TDI Portal Team	TDI Claims Team
Email: TDIportal@pacificguardian.com	**Email: TDIclaims@pacificguardian.com**