



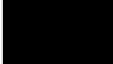
How To:

Edit or Remove 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 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.

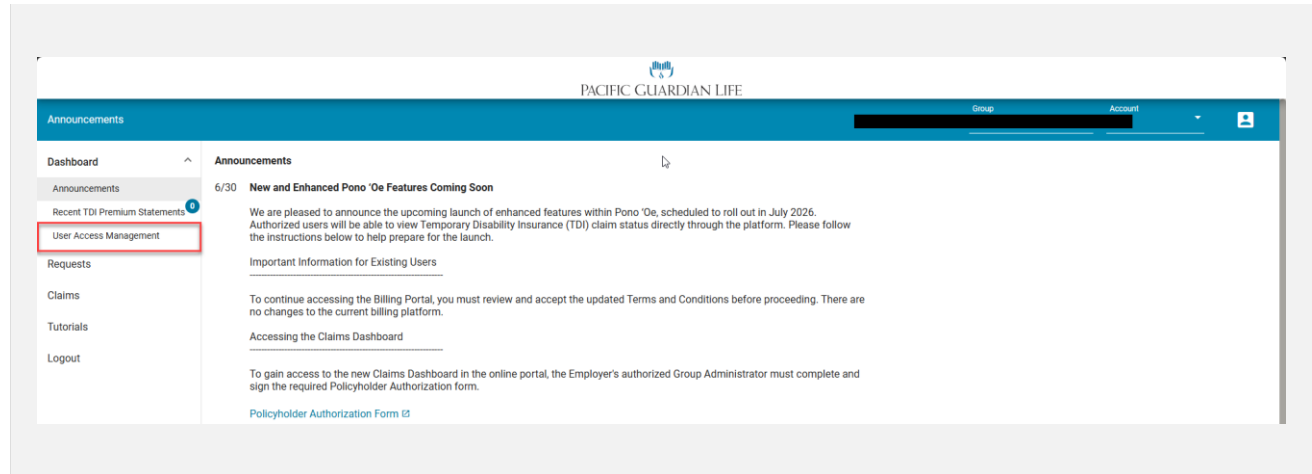
- **Administrator access:** Log in to Pono 'Oe using an account with Policy Administrator permissions.
- **User details:** Have the user's first name, last name, and email address ready.

Workflow 1: Finding a User

1.1

Navigate to User Access Management

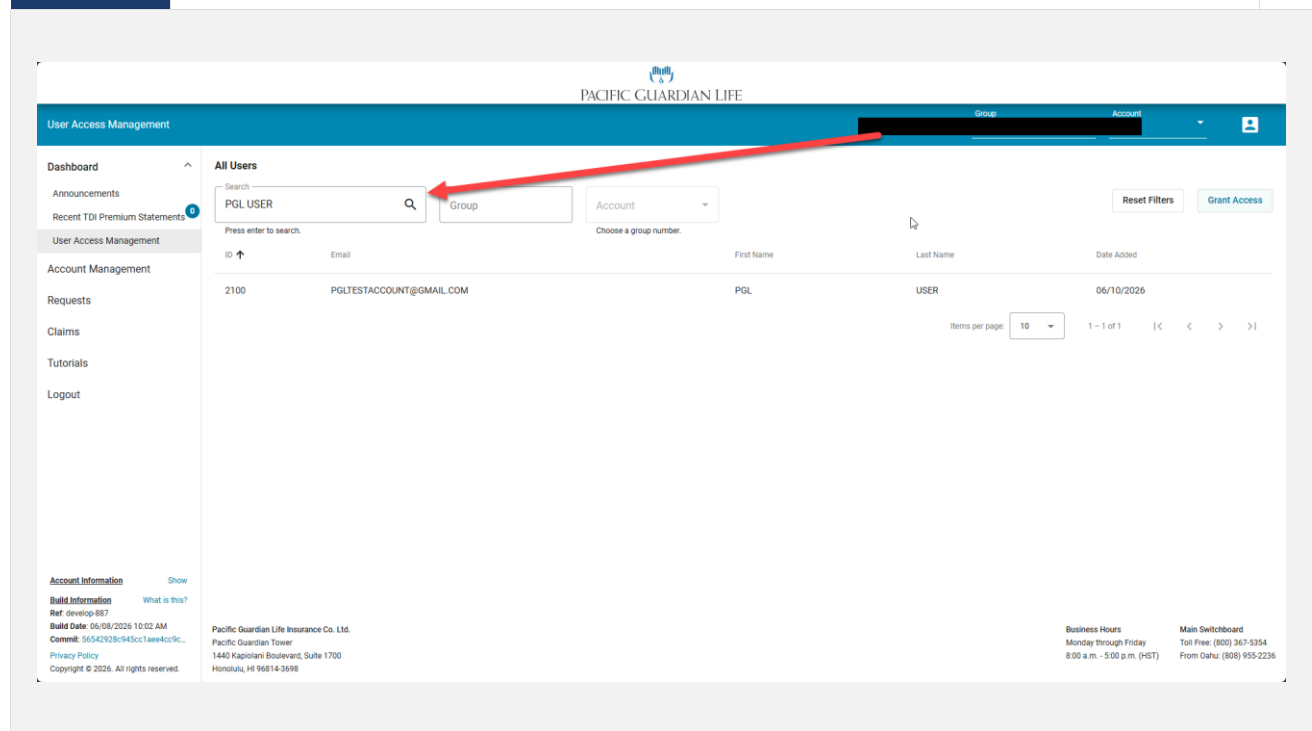
Log in to Pono 'Oe and click User Access Management in the left navigation bar.



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.

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.

The screenshot displays the 'Manage User' interface. On the left, the 'User Information' section shows details for a user with ID 2100, Name PGL USER, and Email Address PGLTESTACCOUNT@GMAIL.COM. A red arrow points to the 'Submit Name/Email Change' button located next to the 'User Information' header. On the right, the 'Accounts' section is visible, featuring a search bar and a table with columns for Group, Account, Account Name, and Action. The table contains one row with a red trash icon in the Action column. Below the table, there is a pagination control showing 'Items per page: 10' and '1 - 1 of 1'.

2.2**Update the Desired Fields**

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

Name/Email Change Request

First Name*
PGL

Last Name*
USER

Email Address*
PGLTESTACCOUNT@GMAIL.COM

☐ Request to deactivate this user account

Cancel Submit

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.

Your request was created successfully. [Close](#)

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.

The screenshot shows the 'Manage User' interface. On the left is the 'User Information' panel with details for User ID 2100, Name PGL USER, and Email Address PGLTESTACCOUNT@GMAIL.COM. On the right is the 'Group Accounts' panel, which is highlighted with a red box. This panel includes a search bar, a table with columns for Group, Account, Account Name, and Action, and a 'Grant Access' button. The table shows two rows of data, both with red trash icons in the Action column. At the bottom of the table, it indicates 'Items per page: 10' and '1 - 2 of 2'.

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.

The screenshot shows the 'Manage User' interface with the 'Permission Set' section highlighted by a red box. The 'User Information' panel on the left is the same as in the previous screenshot. The 'Permission Set' panel on the right contains a table with columns for Group, Account, Account Name, Module, View, and Update. The table has two rows: 'Claims' and 'Billing'. The 'Claims' row has red checkmarks in the View and Update columns. The 'Billing' row has a red checkmark in the View column and an empty checkbox in the Update column. At the bottom right of the interface are 'Cancel' and 'Save' buttons.

3.3

Check or Uncheck Permissions

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

Manage User

[Manage External User](#) / Group: Account:

User Information

User ID
2100

Name
PGL USER

Email Address
PGLTESTACCOUNT@GMAIL.COM

Created On
6/10/26, 10:34 AM

Created By
[REDACTED]

Last Updated On
6/10/26, 10:57 AM

Last Updated By
[REDACTED]

Permission Set

Group	Account	Account Name
Module	View	Update
Claims	☐	☐
Billing	☒	☒

Cancel

Save

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.

Manage User

Manage External User / Group: Account:

User Information

User ID
2100

Name
PGL USER

Email Address
PGLTESTACCOUNT@GMAIL.COM

Created On
6/10/26, 10:34 AM

Created By
[REDACTED]

Last Updated On
6/10/26, 10:57 AM

Last Updated By
[REDACTED]

Permission Set

Group	Account	Account Name
Module		View Update
Claims		☐
Billing	☒	☒

Cancel **Save**

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.

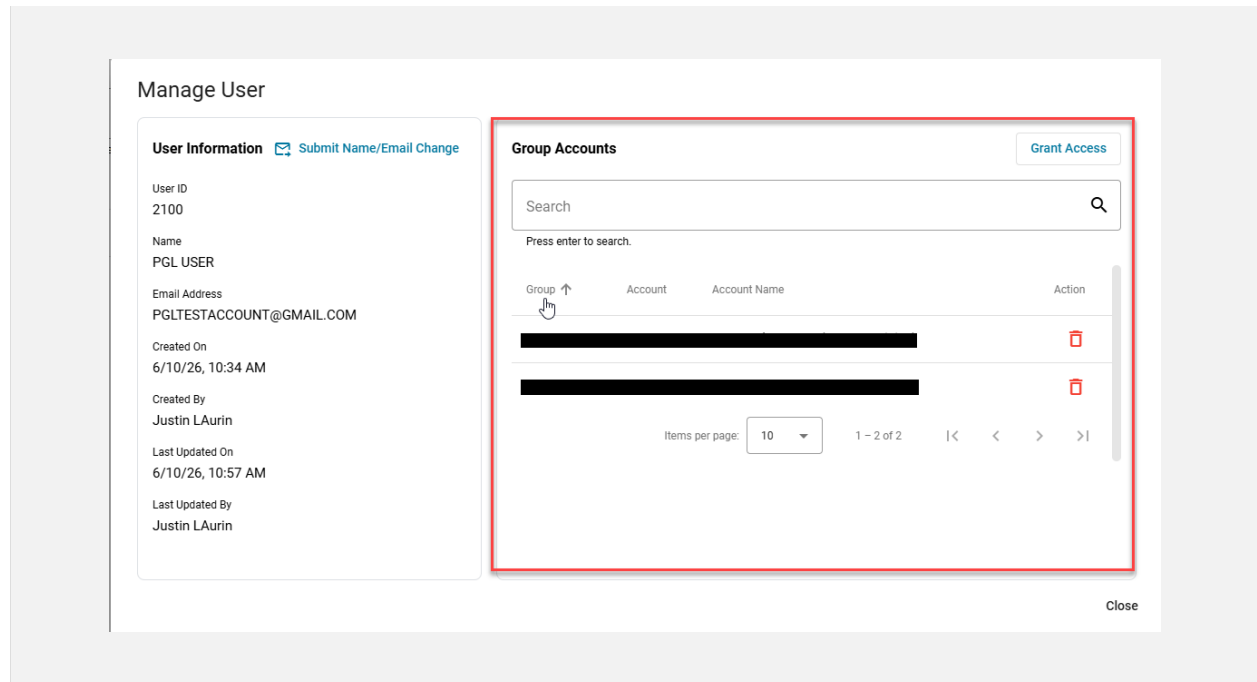
Workflow 4: Adding Access to an Additional Group or Account

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.

Manage User

User Information
[Submit Name/Email Change](#)

User ID
2100

Name
PGL USER

Email Address
PGLTESTACCOUNT@GMAIL.COM

Created On
6/10/26, 10:34 AM

Created By
[REDACTED]

Last Updated On
6/10/26, 10:39 AM

Last Updated By
[REDACTED]

Group Accounts

Press enter to search.

Group	Account	Account Name	Action
[REDACTED]	[REDACTED]	[REDACTED]	Grant Access

Items per page: 10
1 - 1 of 1
|< < > >|

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	☐	☐

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.

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

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.

The screenshot displays the Pacific Guardian Life User Access Management interface. A 'Manage User' modal is open for User ID 1099, Justin LAurin. The modal is divided into two main sections: 'User Information' and 'Group Accounts'.

User Information:

- User ID: 1099
- Name: Justin LAurin
- Email Address: tonjustin12@gmail.com
- Created On: 6/8/26, 2:06 PM
- Created By: PGL staff
- Last Updated On: 6/9/26, 1:56 PM
- Last Updated By: PGL staff

Group Accounts:

A table with columns: Group, Account, Account Name, and Action. A red arrow points to the 'Group Accounts' section. The table shows three rows of data, each with a red 'X' icon in the Action column, indicating a delete or removal action.

Footer:

Build Information: Ref: develop-887, Build Date: 06/08/2026 10:02 AM, Commit: 3654292b945cc1aee4cc9c...
 Pacific Guardian Life Insurance Co. Ltd., Pacific Guardian Tower, 1440 Kapiolani Boulevard, Suite 1700, Honolulu, HI 96814-3688
 Business Hours: Monday through Friday, 8:00 a.m. - 5:00 p.m. (HST)
 Main Switchboard: Toll Free: (800) 367-5354, From Oahu: (808) 955-2236

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.

Manage User

User Information
[Submit Name/Email Change](#)

User ID
1099

Name

Email Address

Created On
6/8/26, 2:06 PM

Created By
PGL staff

Last Updated On
6/9/26, 1:56 PM

Last Updated By
PGL staff

Group Accounts

[Grant Access](#)

Press enter to search.

Group	Account	Account Name	Action

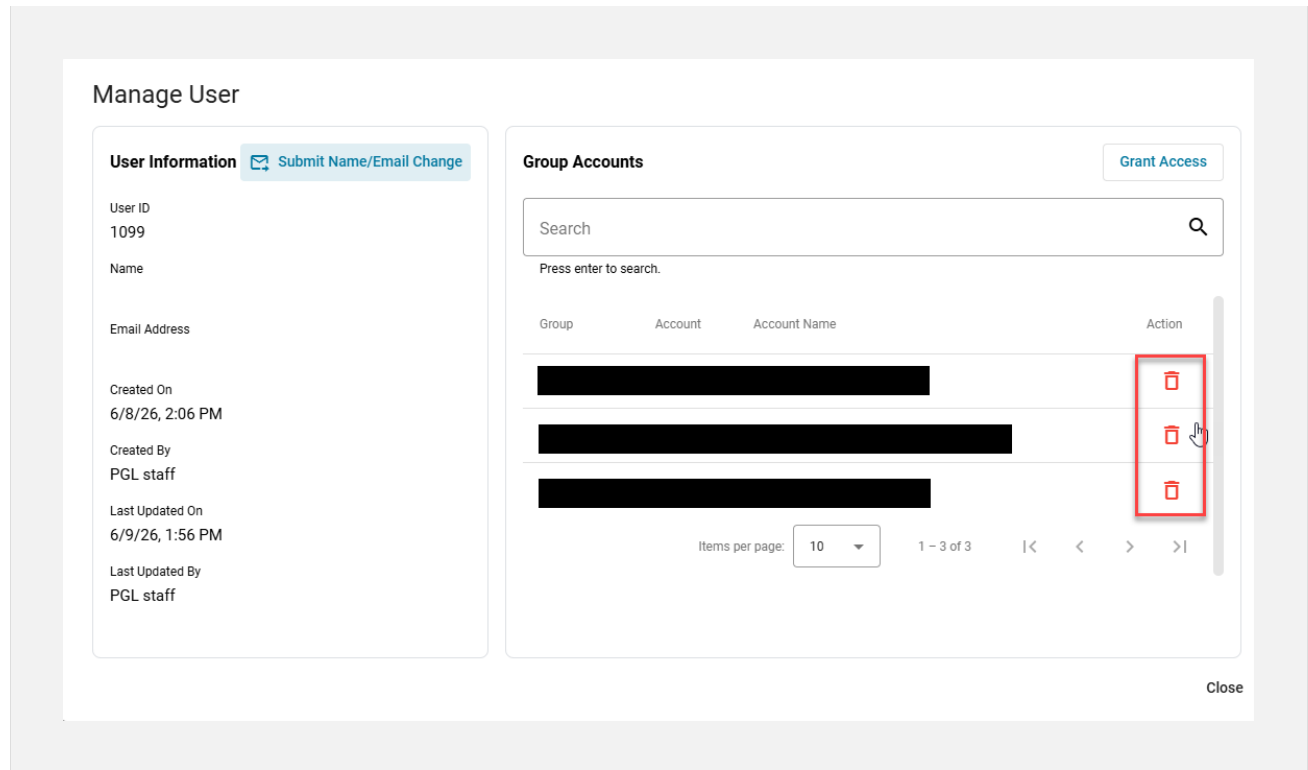
Items per page:
1 - 3 of 3
|<
<
>
>|

Close

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.

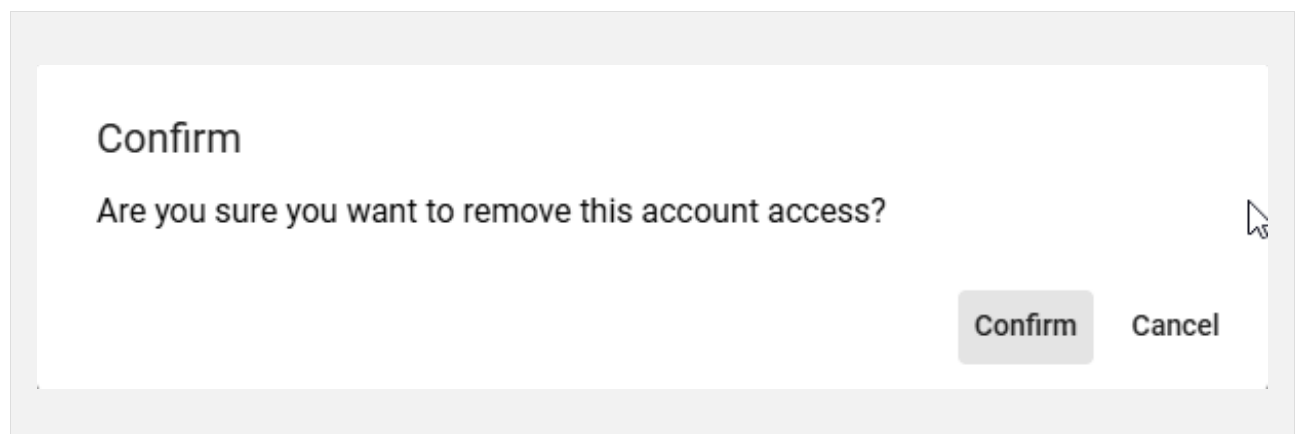


The screenshot shows the 'Manage User' interface. On the left, the 'User Information' panel displays details for User ID 1099, including Name, Email Address, and creation/update timestamps. On the right, the 'Group Accounts' panel features a search bar and a table with three rows of data. The 'Action' column for each row contains a trash can icon, which is highlighted by a red rectangular box. A mouse cursor is positioned over the middle trash can icon. Below the table, there are pagination controls showing 'Items per page: 10' and '1 - 3 of 3'. A 'Close' button is located at the bottom right of the 'Group Accounts' panel.

5.3

Confirm the Removal

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



The screenshot shows a confirmation dialog box with the title 'Confirm'. The main text asks, 'Are you sure you want to remove this account access?'. At the bottom right, there are two buttons: 'Confirm' and 'Cancel'. A mouse cursor is visible near the top right corner of the dialog box.

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

Email: TDIportal@pacificguardian.com

TDI Claims Team

Email: TDIclaims@pacificguardian.com