



How To:

View Users 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 navigating to the User Access Management screen and reviewing the users who have access to the Groups and Accounts they administer, including viewing user details and assigned permissions.

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

Before You Begin

Before starting, confirm that you meet the following access requirements:

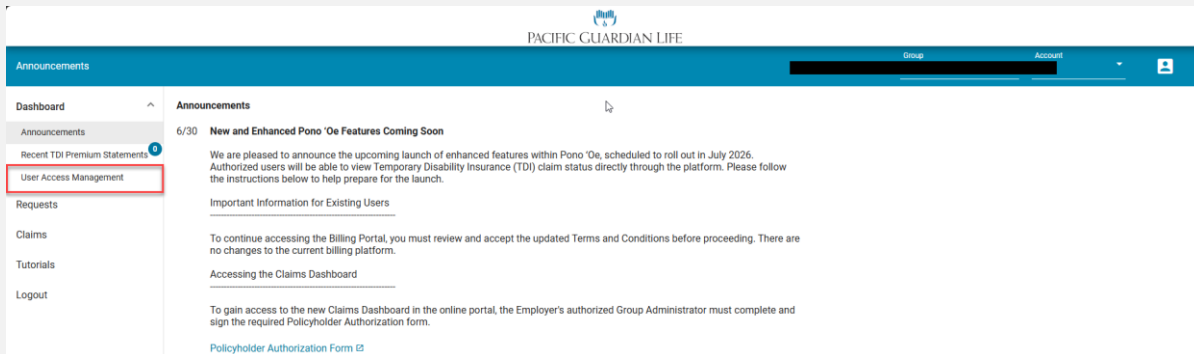
- You are logged in to Pono ‘Oe with Policy Administrator access.
- You are assigned as the Policy Administrator for at least one Group and Account.

Part 1: Navigating User Access Management

1

Log In and Locate User Access Management

After logging in to Pono 'Oe, look for the User Access Management option in the left navigation bar. This option is only visible if you have Policy Administrator access for at least one Group or Account.



2

Click User Access Management

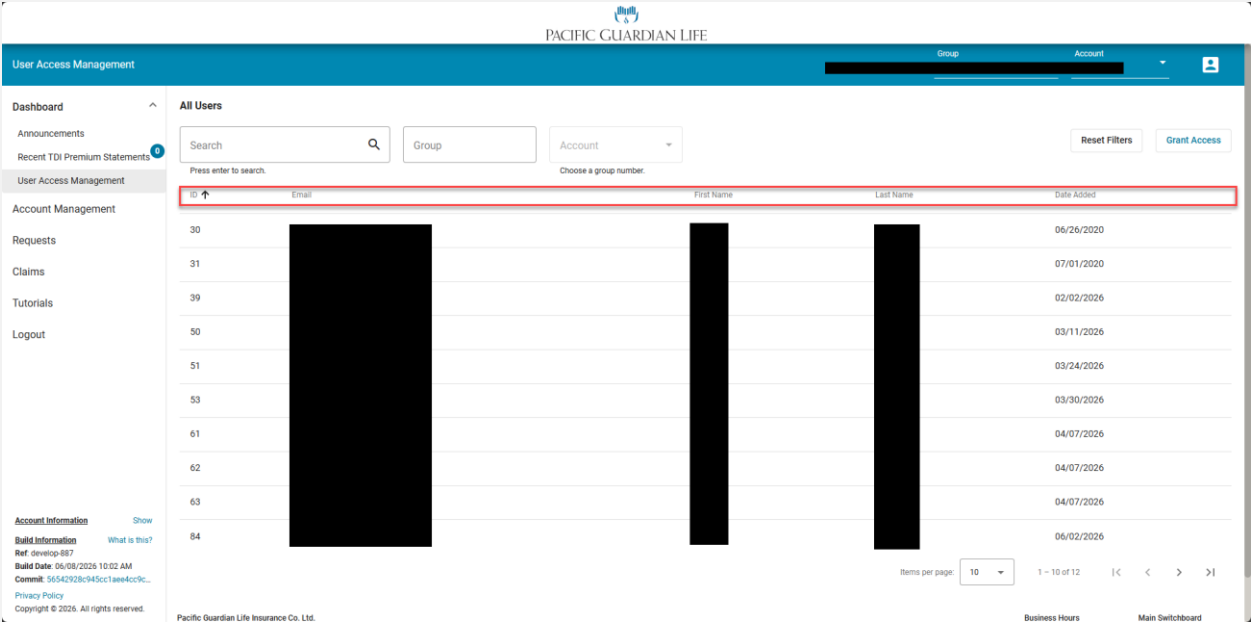
Click the User Access Management option. You will be taken to the User Access Management screen, which displays all Pono 'Oe users who currently have access to the Groups and Accounts you administer.



3

Review the User List

The list displays the following information for each user at a glance: User ID, First Name, Last Name, Email Address, and the Date they were added to Pono 'Oe.



The screenshot shows the 'User Access Management' interface for Pacific Guardian Life. The main section is titled 'All Users' and contains a search bar, a 'Group' dropdown, and an 'Account' dropdown. Below these are buttons for 'Reset Filters' and 'Grant Access'. A table lists users with columns for ID, Email, First Name, Last Name, and Date Added. The table is currently displaying 10 items per page, showing users with IDs 30 through 84. The email addresses are redacted with black boxes. The footer includes 'Pacific Guardian Life Insurance Co. Ltd.', 'Business Hours', and 'Main Switchboard'.

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

NOTE

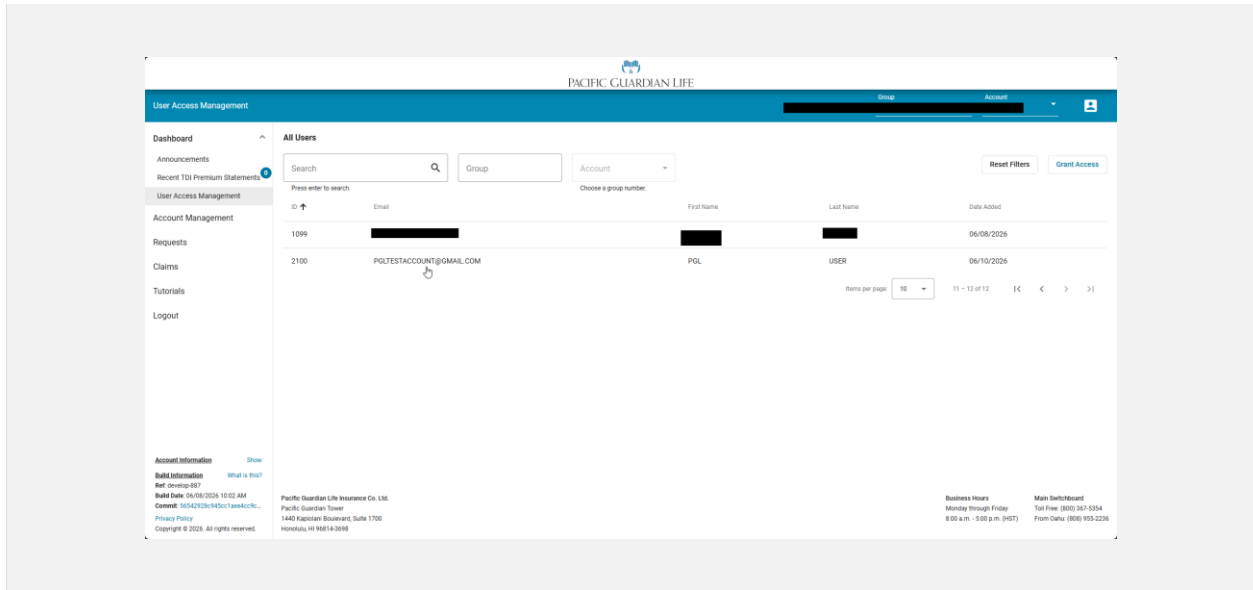
This list only shows users who have access to Groups and Accounts that you are the Policy Administrator for. Users who have access to other Groups and Accounts outside of your administration will not appear here.

Part 2: Viewing a User's Details

1

Click on a User Record

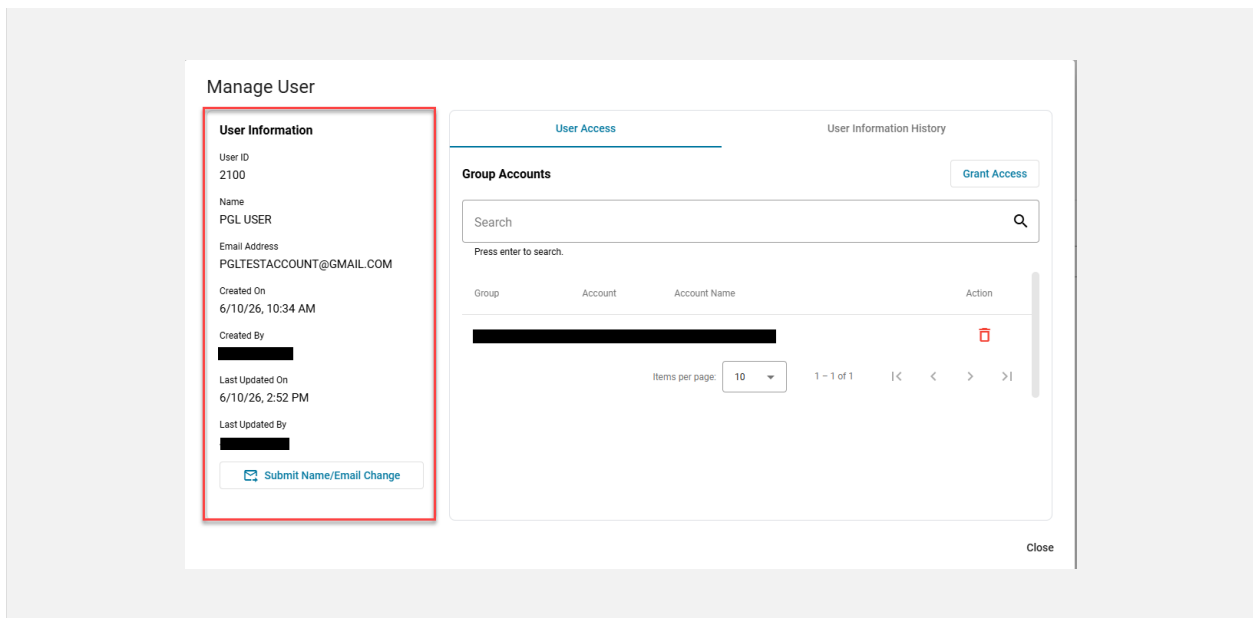
From the user list, click on any user's name or record to open their detail view.



2

Review User Information

The User Information section displays the following details for the selected user: User ID, Name, Email Address (which also serves as their username), Date the account was Created On, Created By, Last Updated On, and Last Updated By.



3

Review Group Accounts

Scroll down to the Group Accounts section. This displays all Groups and Accounts you administer that the user currently has access to. Note that the user may have access to additional Groups and Accounts outside of your administration that will not be visible here.

Manage User

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, 2:52 PM

Last Updated By
[REDACTED]

[Submit Name/Email Change](#)

User Access

User Information History

Group Accounts

Press enter to search.

Group	Account	Account Name	Action
[REDACTED]			

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

Close

4

Click a Group/Account Record to View Permissions

Click on any Group or Account record within the Group Accounts section to view the specific permissions that have been assigned to this user for that Group and Account.

The screenshot displays the 'Manage User' interface. On the left, under 'User Information', the following details are listed: 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, 2:52 PM, and Last Updated By [redacted]. On the right, the 'Permission Set' section is highlighted with a red border. It contains a table with columns for Group, Account, and Account Name, all of which are redacted. Below this is a table with columns for Module, View, and Update. The 'Claims' and 'Billing' modules both have checkmarks in the 'View' and 'Update' columns. At the bottom right of the interface are 'Cancel' and 'Save' buttons.

Module	View	Update
Claims	☒	☒
Billing	☒	☒

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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