

Frequently Asked Questions about the Client Administrator Function

What is a Client Administrator?

A Client Administrator is a representative from your company who manages all of the company's Benefit Manager Toolkit® (BMT) accounts. The Client Administrator will set up accounts for new BMT users, plus manage current user accounts, including resetting passwords, updating user contact information, setting access levels (ex: read-only), and, when necessary, removing users.

What is the benefit of having a Client Administrator?

By having a Client Administrator, your organization will have more control over the Benefit Manager Toolkit experience. Since you will no longer have to wait for accounts to be created or passwords to be reset, you and your staff get immediate access to the Toolkit and its eligibility management features.

If the Client Administrator is already registered for Benefit Manager Toolkit, do they have to set up a new account?

Yes. Existing Benefit Manager Toolkit user accounts will be deactivated after the Client Administrator is set up.

How does the Client Administrator add a Benefit Manager Toolkit user?

The Client Administrator will go to the Client Admin section and choose "Create User". The Client Administrator will then input the user's name and information, and set a username and password.

How long does it take to add or terminate a user?

Depending on the speed of your internet connection, either function should take no more than three to four minutes.

Can the Client Administrator reset passwords?

Yes. The Client Administrator will be able to reissue passwords for Benefit Manager Toolkit users.

How many Client Administrators can my company have?

You may have one Client Administrator per organization.

Can the Client Administrator create a Delegate?

Yes. The Client Administrator is able to create a delegate. A delegate is a user who can create other users and manage authorizations on behalf of the Client Administrator. The Delegate is granted the same access as the Client Administrator.

How is a Delegate created?

Once a Client Administrator is active, a delegate can be created. This is done by selecting Client Admin and Create User in BMT. Under the Application Access section, simply select Create Delegate.

Can the Client Administrator limit the features a user can access?

Yes. The Client Administrator may grant read-only access to a Benefit Manager Toolkit user, or restrict the user's access to select subgroups. The Client Administrator may also grant access to Client Knowledge or billing reports (if applicable).

Will Client Administrators be able to see usernames and passwords?

Client Administrators can see a Benefit Manager Toolkit user's username, but not their current password. Client Administrators have the ability to reset passwords.

Can Benefit Manager Toolkit users choose their own username and password?

The Client Administrator will set up the Benefit Manager Toolkit user's username and initial password. Toolkit users are encouraged to reset their password.

How does this affect current Benefit Manager Toolkit users?

Once a Client Administrator is active, access to all current Benefit Manager Toolkit accounts will be revoked and the Client Administrator will set up new user accounts. This will cleanse the system of any out-of-date accounts and ensure all users have the correct access. Client Administrators will have 30 days to set up the new accounts before access to the old accounts are revoked.

What happens if the Client Administrator leaves the company or if we want to change Client Administrators?

If the Client Administrator leaves, please notify your account representative. We will disable the Client Administrator's access and add a new Client Administrator.

Will the new Client Administrator be able to see the users that were set up by the previous Client Administrator?

Yes. Any user set up by previous Client Administrators is visible to the new Client Administrator.

Can the Client Administrator reset their own password if they lose or forget it?

Yes, as long as the Client Administrator can correctly answer the secret question provided during registration.