



MAIN OFFICE
201 Merchant St, Suite 1100
Honolulu, HI 96813
Phone (808) 533-3222
Fax (808) 533-8777

User Access Request Form

Important Procedural Instructions (please read): *All fields must be completed.*
New & Change Employee request – Unit Manager to Complete, Sign

Today's Date: New Employee Change Employee Employee Start Date:

Name & Address

First Name: Middle Name: Last Name:
Short Name: Email Address:
Address:
Residence Phone #: Business Phone #:
Cell Phone #: Fax Phone #:

General

Type: Exec: Rep: Sales Center Rep Other:
Status: Active: Inactive: Retired:
Time Worked: Full Time: Part Time: Time Zone:
Employee Identifier: Title: Supervisor:
Emergency Contact Information: Name: Phone #:
1099 - Category: Type:

License Information

Property & Casualty: State: Eff Date: Exp Date:
Life & Health: State: Eff Date: Exp Date:

Security

Security Group: All: Servicer: House AE: Benefits House AE: Independent Agent:
Security Group Assignment: Security Group Assignment:
Security Group Assignment: Security Group Assignment:
Limit Employee's Access to Their Customers Only (Independent Agents)

Signatures

Chason Ishii Account Exec \$25,000
No Signature (for checks) NOSIGN \$500,000

Approval

Approved By: Signature: Date: Requestor:

For MIS Dept. Use Only:

Received Request Date: Date Entered:
VSSO Enabled: Yes: No: Entered by:



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Security Group Assignments:

Group Name	Description
<ACBR> Bank Recon	<ACBR> Bank Recon Only
<ACCD> Accounting - DB	Copied Bookkeeper group and removed functionality except for Pay Commissions and Processing Direct Bill Statements
<ACCM> copied from ACCR	<ACCM> copied from ACCR added Dircet Bill Function
<ACCR> copied from Book	<ACCR> copied from Book added Bank, Deposit Bank Rec, JE
<ACPR> Payables & Receipts	<ACPR> copied a ACCD group added funcuality for recievables removed Dircet bill function
<ACPV> copied from ACPR	<ACPV> copied from ACPR added vendor payables
<ADPR> copied from ACPR	<ADPR> copied from ACPR Accounting Direct Bill, Company Payable & Receipts
<AEX> Copied EXEC	Account Executive
ADMIN	System Administrator
Download Processing	Download Processing and Download Reports
Indpend Prod	Account Executive
License Information Update	License Information Update - Employee Center
OWNER	Owner
PLRating	PL Rating Customer Service Representative
Prevail Network Setup	New group with permission to access Prevail Network from Toolbox - Integration menu.
Proposal Builder - Admin	Proposal Builder & InsurLink - Admin
Purge	Purge Customer & Activity with out accounting activity
Reports	Transaction Reports
S247Admin	Service 247 Admin
S247User	Service 247 User
Servicer w/ No Invoicing	<SVCN>> Copied Servicer w/ Invoicing group and removed all invoicing permissions
Servicer w/Invoicing	<SVCI> Copied CSR template and added permission to void/correct invoices; removed reports except for invoice, future invoice, EPI, Certs, Summary of Ins; No access to form letter/summary templates
Servicer w/Invoicing, Clear Lock	<SVCC> Copied CSR template and added permission to void/correct invoices; removed reports except for invoice, future invoice, EPI, Certs, Summary of Ins; No access to form letter/summary templates
Servicer w/NoInvoice	<SVCP> Copied Servicer w/ Invoicing group and removed all invoicing permissions
View Only	View Only - Copied from AEX