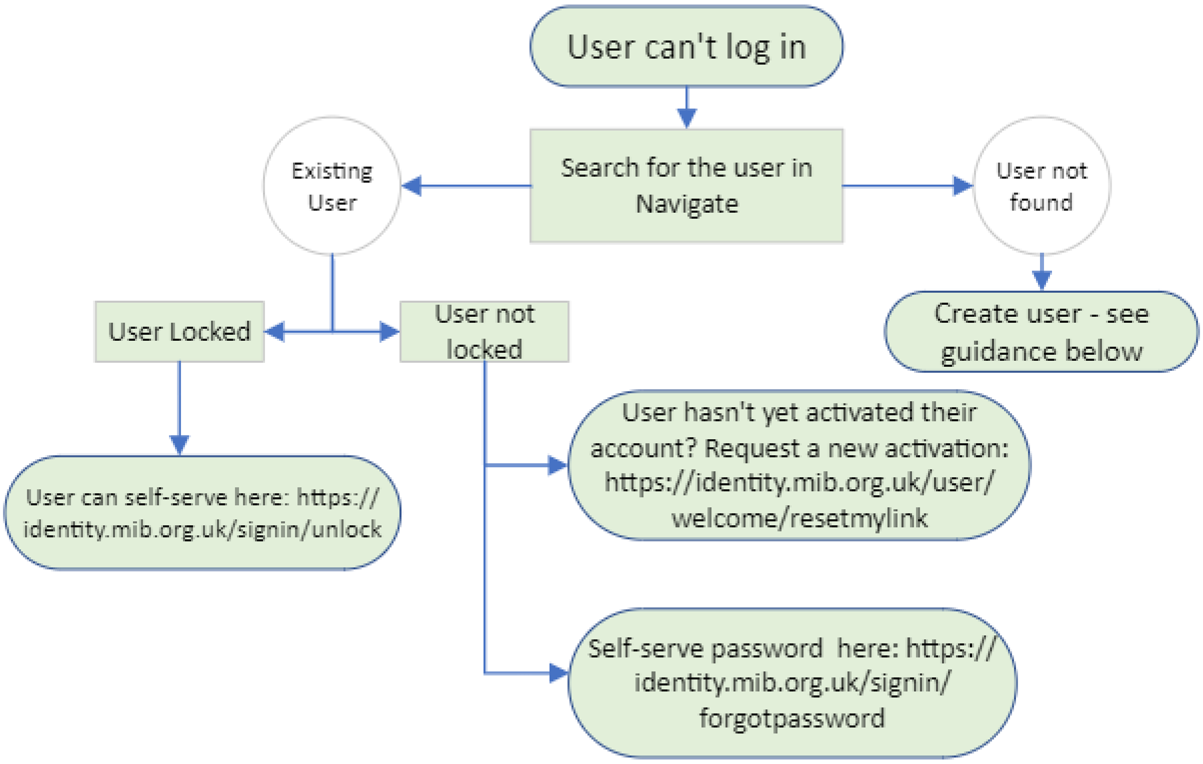
Supporting Policyholder Users – Navigate Helpdesk Guide

This document is intended to provide information to support Helpdesks with resolving Policyholder user issues.

Table of Contents

Policyholder access troubleshooting

Here is a simple flow chart to help you resolve common Navigate user access issues.



Self-serve links

Unlock account: https://identity.mib.org.uk/signin/unlock
New activation link: https://identity.mib.org.uk/user/welcome/resetmylink
Password reset: https://identity.mib.org.uk/signin/forgotpassword

Helpdesk Quick Start Guide

We have created a guide for Insurer/DA Helpdesk Level 2 and Level 3 users summarising the changes and enhancements in Navigate - Helpdesk User Quick Start Guide.

Helpful Hints

- If you have exhausted all your options and need to seek help from MIB, a member of the helpdesk team can raise a ticket using the contact support button in the portal. Please ensure one ticket per Policyholder issue is raised.
- You must use both forename and surname when creating for a user to ensure the user gets created successfully.

- Check in User Details that the Policyholder has access to the correct policy.
- If the user is trying to reset their own password and is receiving the email which states “At this time your password can only be reset by an administrator” this means they haven’t activated their account yet – and will need to request a new activation email using the link above.
- If the user is experiencing issues when logging in where it loops back to the log in page, please check that the Policyholder user has correct access and has not been deleted in error.
- When created, users will receive an activation code – this will come from noreply@okta.com – the user should check their spam/ junk folders for this email and ensure it has not been blocked by their security firewall.

Other Policyholder Queries

- For any other queries relating to Navigate functionality, you can refer your Policyholder to the Navigate Policyholder User Guide.
- If you believe something is not functioning as you think it should, a member of the helpdesk team can raise a ticket on behalf of your Policyholder using the contact support button in the portal. Please provide a clear description of the problem, as well as the Policyholder’s First and Last Name so the issue can be investigated.

Managing Policyholder Users

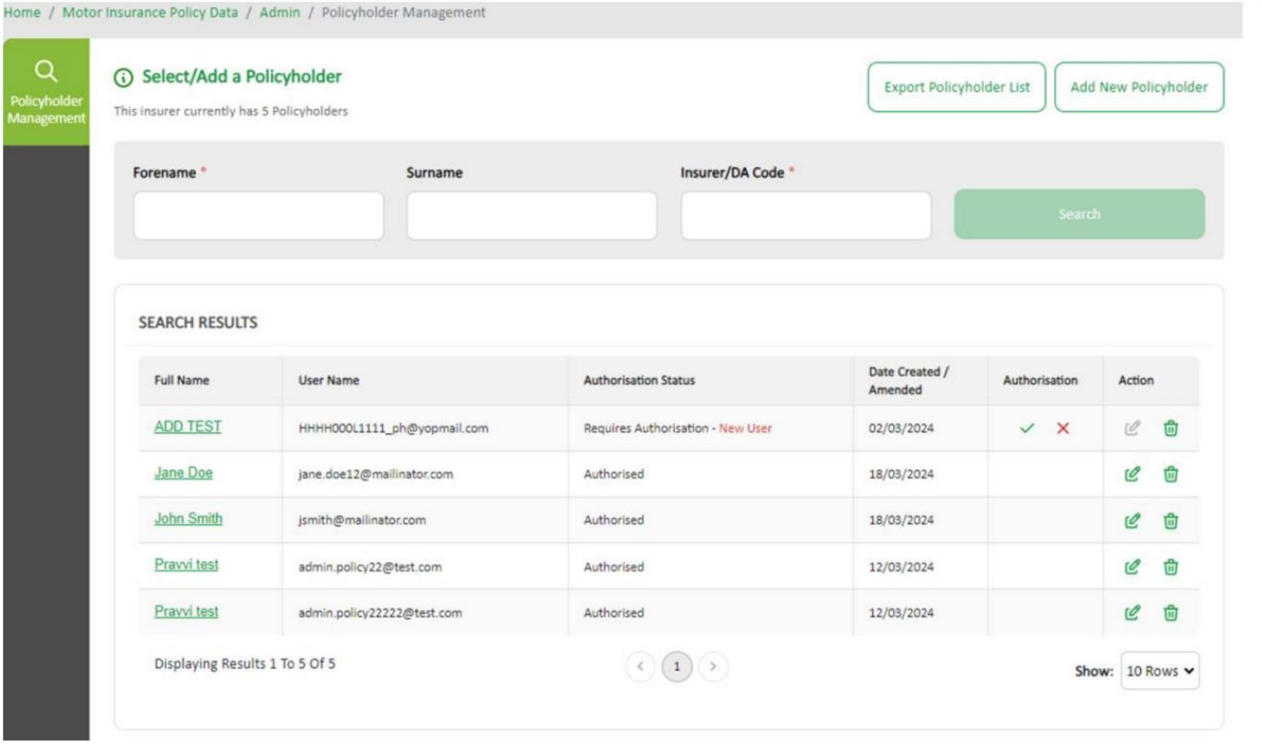
View policyholder users

To access policyholder maintenance, you must first have the required access, select the “User Admin” tile on the left-hand side of Navigate. You’ll then be presented with the Policyholder Management page. The role associated with this is Navigate Helpdesk L2 or L3, (L2 or L3).

The table shows the user’s full name, email, authorisation status, date created or amended, authorisation and edit/delete action for helpdesk users, for all of policyholder users. You can filter the list by user’s name and Insurer/DA Code, both must be entered for the search to work. Surname is not a mandatory field to search with, as policyholders may have an organisation name within the forename field.

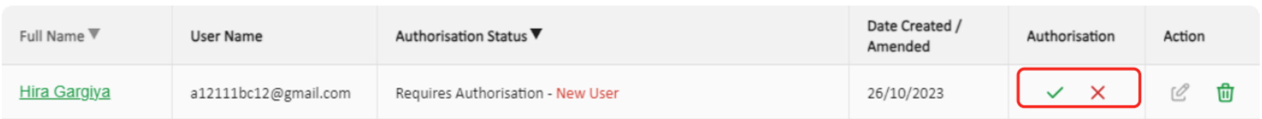
To locate a specific policyholder, enter the Insurer ID (with or without the DA ID) e.g. 111 or 111888, in the Insurer/DA Code box then enter the exact user forename and surname in the user’s name boxes and select “Search”.

If the exact users name is not known, enter one or more letters and select “Search”, and any users that start with the same letter/s will be displayed.

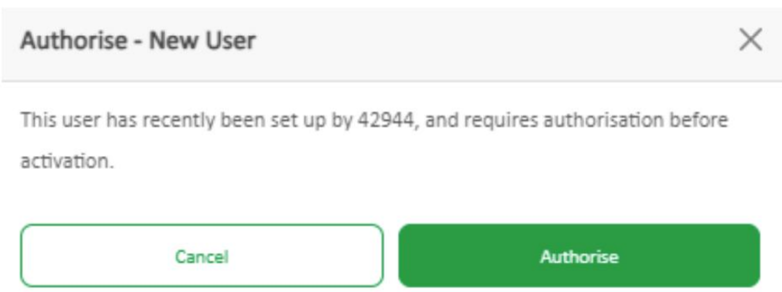


Authorise/Decline authorisation action

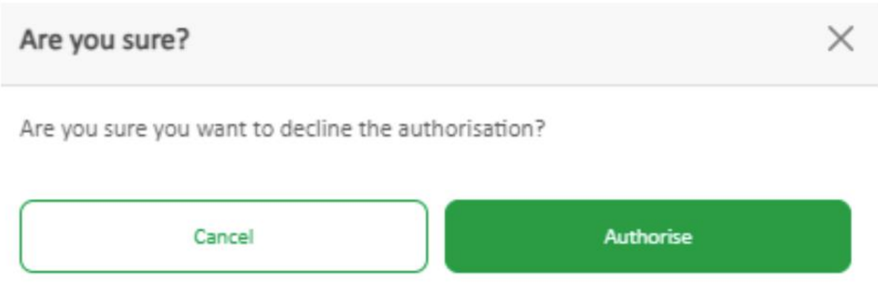
Within the policyholder search results, you'll see an authorisation column (see below). To authorise the work of a L3 user, a L2 or a different L3 user can do this from this page.



You'll see either a tick or cross icon next to any action that requires authorisation. To authorise the request, the user should click on the tick icon, where a pop up will be presented to show the user the basic amendment details of the request.



If you choose to press the cross icon, a pop up will ask you if you're sure you want to decline the authorisation. This will decline the changes presented by a previous L3 user. The information will revert prior to the change. If the Policyholder was in a "New User" state, they will be deleted, as they have not been authorised fully on to Navigate.



If you wish to view more details, you can view these by clicking on the user's full name in the table to expand the Policyholders details.

L3 users cannot authorise their own work, this will disable authorisation and edit functions.

Action

Next to the relevant policyholders, you'll be able to see an action column, where you can quickly edit a policyholder, using the pen icon.

The pen will be greyed out if you're a L3 user and your action is waiting to be authorised, or if the user is in new user state.

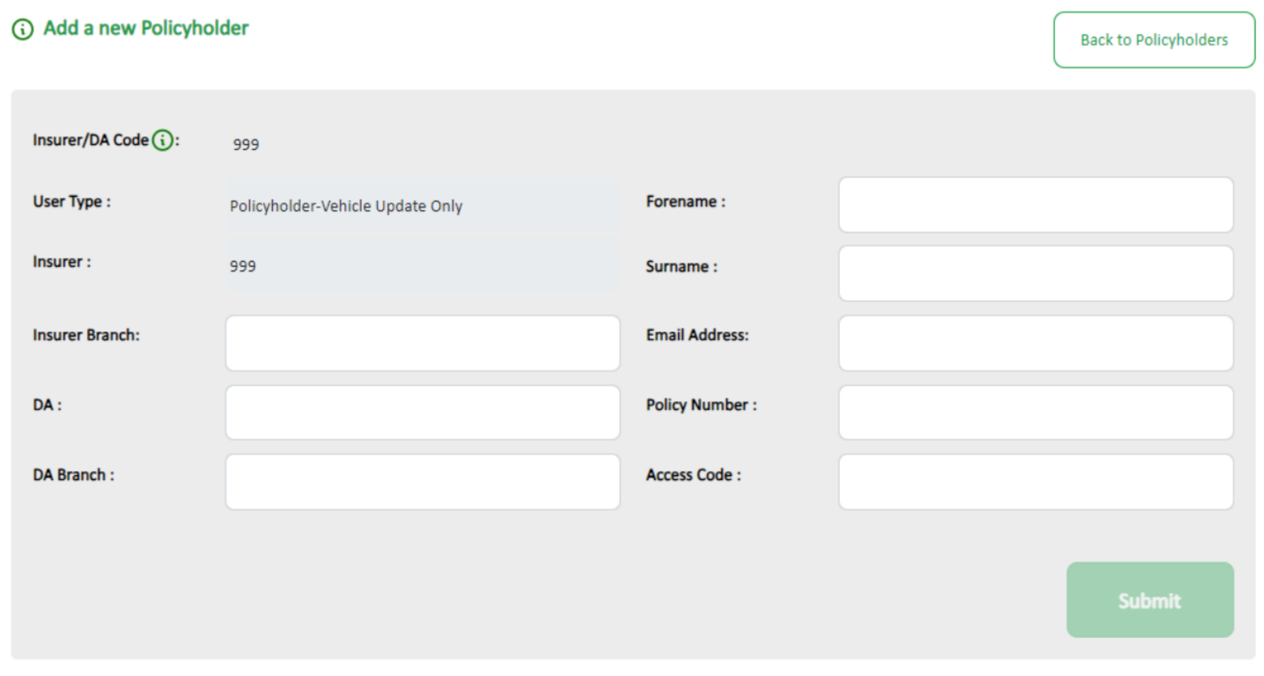
The bin icon will allow you to delete a policyholder, a relevant pop up will be provided to notify you of the action. If you're an L3 user, the action will need to be authorised by a L2 or a different L3 user.

Add a new policyholder

To add a new policyholder while in the User Admin and Policyholder Management menu, select "Add New Policyholder" from the policyholder list page. This will open the policyholder creation page for completion.

The following fields are mandatory and must be entered:

- Forename and surname
- Email Address
- Policy Number or Access Code



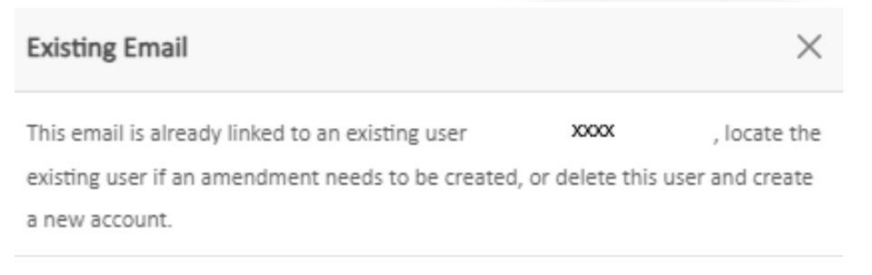
As an L2 user, your actions are authorised automatically when pressing submit, however as an L3 user performing an action, they'll need to be authorised by a different L3 or L2 user when pressing submit.

Once authorised, the new policyholder should then automatically be sent an email by OKTA, the Navigate user management system.

The action of authorising L3's work is described in more detail in section 5.3.

Currently, you'll not be able to amend a user's email or name once they have been created. If the email entered has changed, delete this user and create a new record. If required, a support request can be made to amend the users name, select the 'Help-Contact support'.

Please note – when a policyholder already exists on Navigate, as they have been set up by another organisation, the name provided by their initial set up will be the name that will show on your policyholder's details once saved. Additionally, if a user has already been set up by your organisation using the same email address, you'll be notified by a popup.



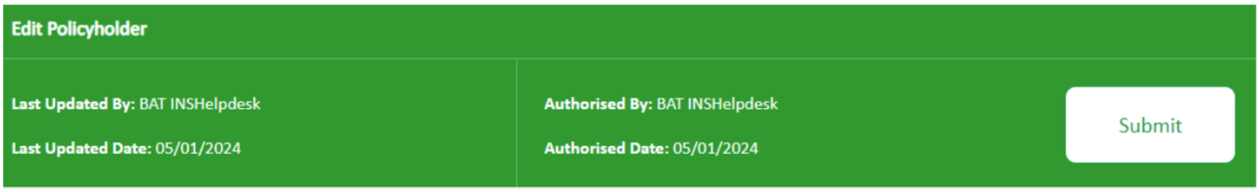
Review policyholder details

To review an existing policyholder, from the Policyholder Management tile, search for the user in the policyholder list, then select the hyperlinked user's name or click on the pen icon where it's enabled. The pen icon is another new addition under the "Action" column and will open the policyholder details page.

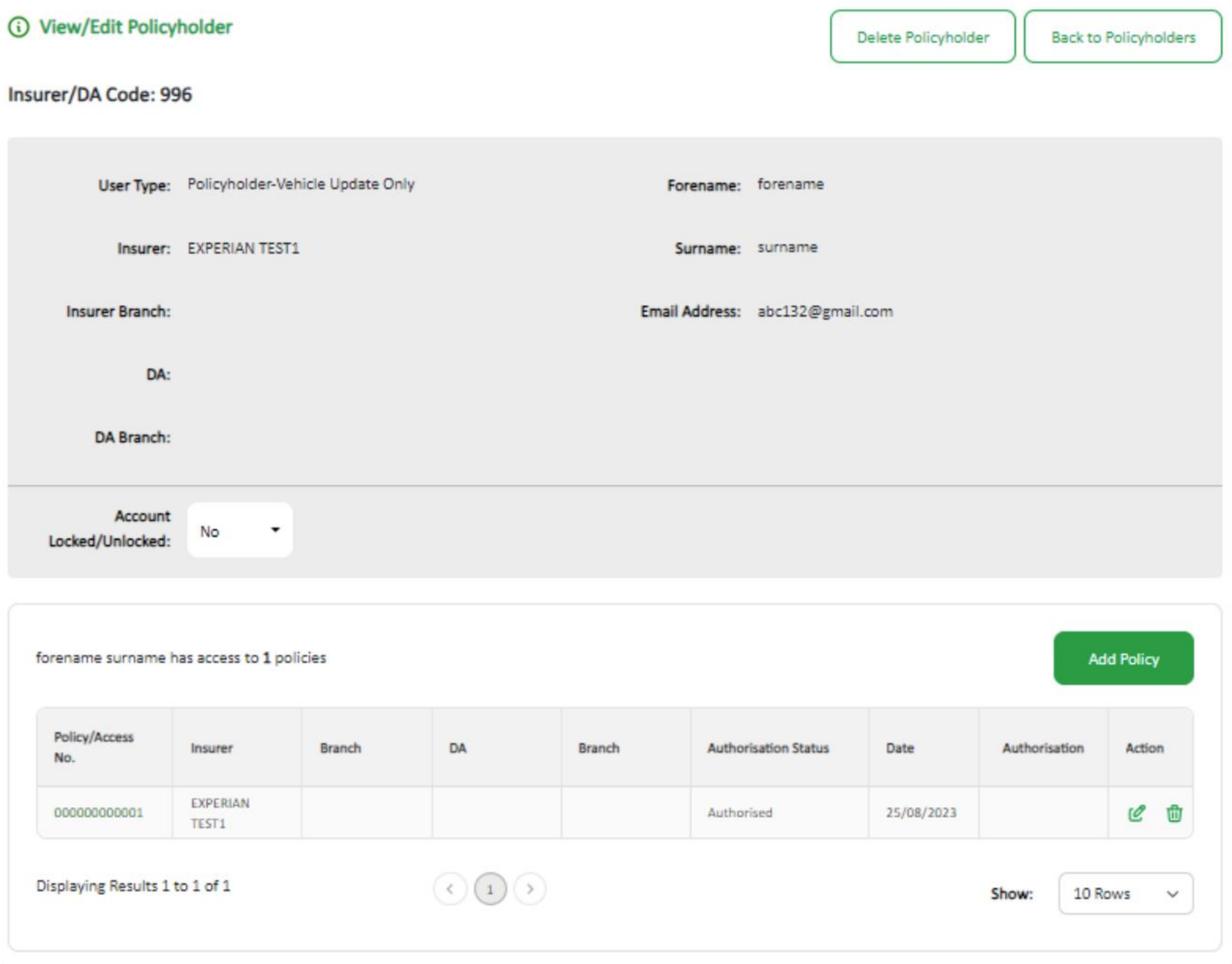
Full Name	User Name	Authorisation Status	Date Created / Amended	Authorisation	Action
ADD TEST	Gph1@mailinator.com	Authorised	05/01/2024		

You'll be able to lock/unlock the account, and you can also add, amend or remove policies, which is explained in section 5.7 in the Insurer & DA user Guide.

Once the changes have been made click "Submit". L2's work will be authorised automatically, and L3's work will need to be authorised by another user.



Once a change has been submitted by a L3 and is pending authorisation, a user will not be able to amend the details until they have been approved or declined.

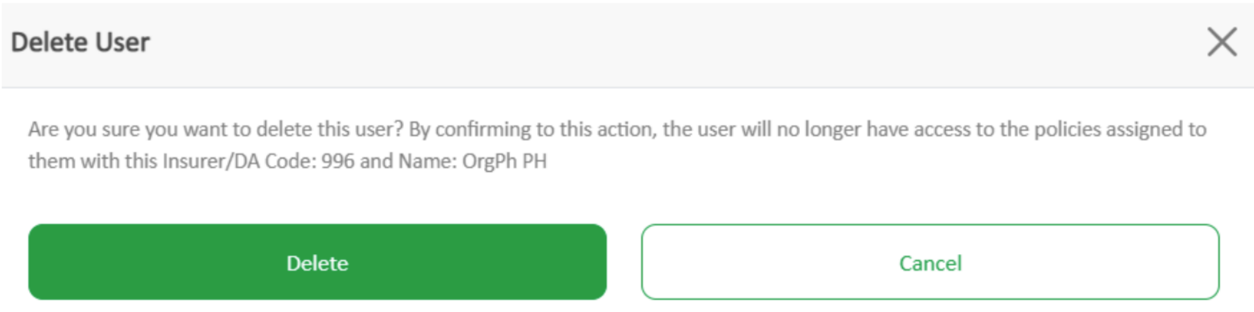


Delete a policyholder

From the Policyholder Management tile select "User Admin" then search for the user in the policyholder list and select the users name or the pen icon. This will open the policyholder details page and you can select "Delete Policyholder".

You'll then be presented with a prompt, select "Delete" to remove the policyholder.

If a L2 has performed this action the user will have been deleted, if a L3 user has performed this action, this will create a task which requires authorisation for that policyholder on the management home page, which the user will be taken to by default, the action will have a "Requires Authorisation – Delete User" status.



You can also delete a Policyholder by selecting the bin icon in the “Action” column on the first screen where you can view all Policyholders. This will present the user with the same pop-up information.

Full Name ▼	User Name	Authorisation Status	Date Created / Amended	Authorisation	Action
sce4 278	sce4278@gmail.com	Requires Authorisation - Delete Policy	07/11/2023		

To authorise the deletion of the Policyholder if not an L2, another L2 or L3 user will need to authorise this by selecting the tick under the Authorisation column.

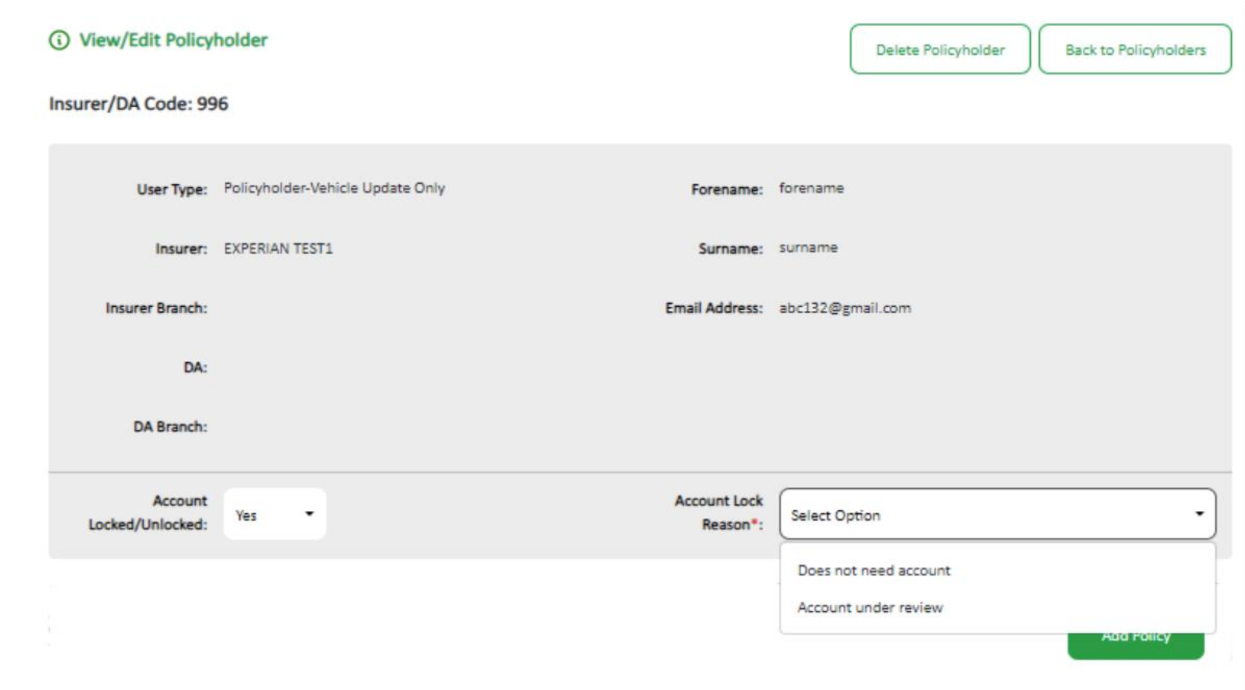
Full Name	User Name	Authorisation Status ▼	Date Created / Amended	Authorisation	Action
sce7 278	sce7289@gmail.com	Requires Authorisation - Unlock	07/11/2023		
Scenario3 27835	Scenario3_27835@mailinator.com	Requires Authorisation - Unlock	30/10/2023		
Hira Gargiya	a12111bc12@gmail.com	Requires Authorisation - New User	26/10/2023		

If an action needs to be declined, the user needs to press the X icon in the authorisation column.

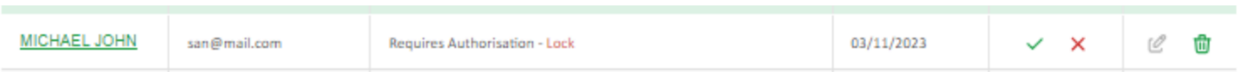
Lock/Unlock a Policyholder

If a user no longer requires access to policies, or their account is under review a L2 or L3 user can lock their account. This will only lock the user with policies associated to your Insurer/DA account, this will not lock the user out of Navigate if they have access to update policies for other organisations.

If account needs to be locked then you select yes, this will present you with an additional drop-down selection, where you’ll be required to choose the reason for locking their account then submit the change.

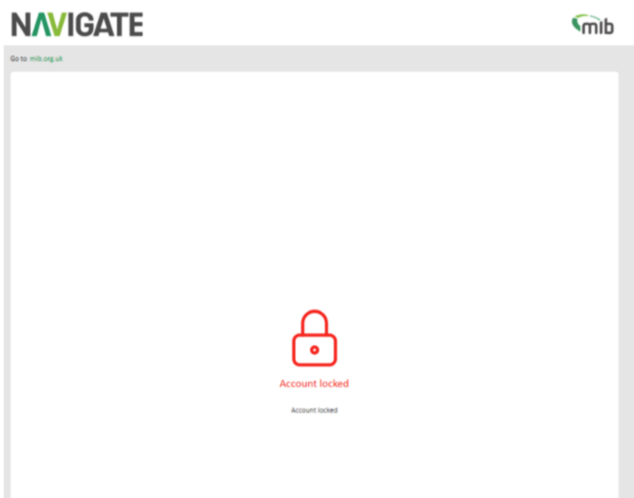


An L2 user can lock the account without authorisation, if an L3 user, authorisation is required and will be put into the queue of work as “Requires Authorisation – Lock” once the action has been submitted. A L2 or L3 user will authorise or decline the action.



The policyholder will be informed via email that their account is locked and will be shown the

following screen when logging in. If they’re insured elsewhere, they will still have access to Navigate, but only for the policies by other insurers.



An L2 or L3 user can unlock the policyholders account if required by selecting “No” in the drop down next to Lock account, followed by the same steps above. The action to be authorised will be shown as “Requires Authorisation – Unlock"

Add/remove/edit policy access for a policyholder

From the “User Admin” tile search for the policyholder and select the users name or pen icon, this will open the Policyholder Management page.

The bottom of the screen will display a table with the policy numbers the policyholder has access to. You can add a new policy number, edit or delete any existing policy number, using the appropriate “Add Policy” button, bin or pen icon under the Action column.

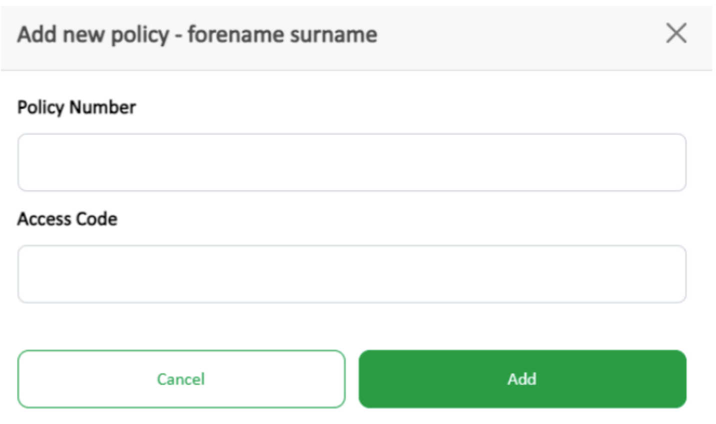
To add a policy, select “Add Policy”, enter the policy number assigned to the user and Access Code if applicable.

forename surname has access to 2 policies

Add Policy

Policy/Access No.	Insurer	Branch	DA	Branch	Authorisation Status	Date	Authorisation	Action
000000000001	EXPERIAN TEST1				Authorised	25/08/2023		
000000000002	EXPERIAN TEST1				Authorised	05/01/2024		

Displaying Results 1 to 2 of 2 ‹ 1 › Show: 10 Rows



Navigate will recognise a L2 user adding a new policy and update the policyholder’s table.

If a L3 user were to add a policy this will be put into the queue of work on the policyholder table or view all policyholders table to be authorised by a L2 or another L3 showing “Requires Authorisation – New Policy”.

Policy/Access No.	Insurer	Branch	DA	Branch	Authorisation Status	Date	Authorisation	Action
UATPERFTEST16 2	EXPERIAN TEST1	Testing			Requires Authorisation - New Policy	05/01/2024	✓ ✗	
UATPERFTEST16 3	EXPERIAN TEST1	Testing			Authorised	27/10/2023		

To remove a policy from a policyholder, click on the bin icon under the action column, again a prompt will appear asking if you're sure you want to delete the policy. A L2 user will be able to remove the policy straight away, a L3 users work will require authorisation.

Remove policy access ×

Are you sure you want to remove policy access from this user?

Keep this policy | Remove

An L2 or different L3 will action this request by selecting the tick or cross on "Requires Authorisation - Delete Policy" row.

Please note, you cannot delete the last remaining policy access, if the policyholder no longer requires access, you must then delete the policyholder. You'll see the following error if this is the case:

You cannot remove the only remaining user access. A user must contain at least one user access. ×

Export a policyholder email list

Select "User Admin", then select "Export Policyholder List" button. A .csv file can be downloaded containing details of policyholders. The web browser may prompt asking if the file is to be opened or saved.

If opened, then the Excel spreadsheet will be displayed which contains Insurer/DA Code, Forename, Surname, and user email address.

N8

	A	B	C	D
1	Insurer/DA Code	Forename	Surname	User email address
2	996	ADD	TEST	Gph1@mailinator.com
3	996	AJITH	VENKA	BAT_INSHelpdeskL5@mailinator.com
4	996	BAT	INSHelpde	BAT_INSHelpdeskL2@mailinator.com
5	996	BAT100	Test100	battest98@mailinator.com
6	996	BAT108	Test108	battest108@mailinator.com
7	996	BAT11111	Test11111	battest1111@mailinator.com
8	996	BAT11111	Test11111	battest111111@mailinator.com