

Client Administration

Milliman **Access Portal**

Client Tree

Client Name Search



Top Level Client

0273PRM



1
0
+

Sub Client Name

0273PRM



1
0
+

Sub Client Name

0273PRM



1
0
-

Top Client 2

0273PRM



1
0
-



Create New Client

Client Administration

Milliman Access Portal

Client Tree

Client Name Search

Top Level Client
0273PRM    

Sub Client Name
0273PRM    

Sub Client Name
0273PRM    

Top Client 2
0273PRM    

Create New Client 

Client Information

Client Information

Client Name:	Client Code:
<input type="text"/>	<input type="text"/>
Primary Client Contact:	Client Contact Title:
<input type="text"/>	<input type="text"/>
Client Contact Email:	Client Contact Phone:
<input type="text"/>	<input type="text"/>

Security Information

Approved Email Domain List:	
<input type="text"/> @clientdomain.com, @anotherdomain.com, @milliman.com	
Approved Email Exception List:	
<input type="text"/> blah@blah.com	

Billing Information

Primary Consultant:	Primary Consultant Email:
<input type="text"/>	<input type="text"/>
Office:	Profit Center:
<input type="text"/> a/an Office	<input type="text"/>

SAVE CHANGES

pencil in blue = edit
+ in green = add new sub client
trash in red = delete and only can apply to leaf

Client Administration

Client Tree

Client Name Search

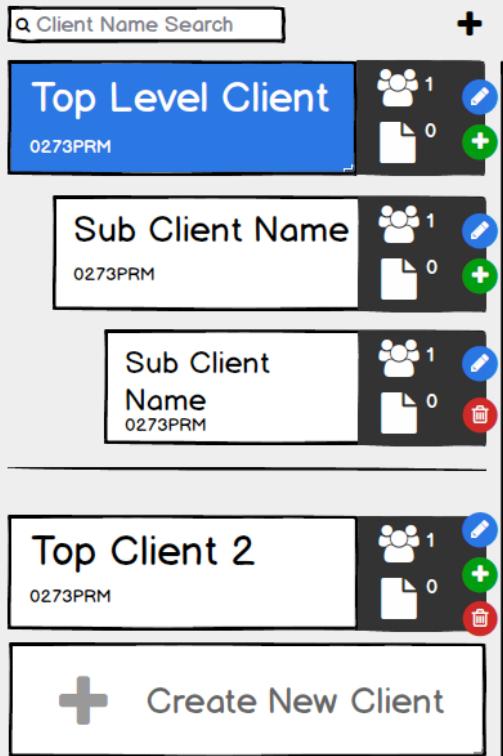
Top Level Client
0273PRM

Sub Client Name
0273PRM

Sub Client Name
0273PRM

Top Client 2
0273PRM

Create New Client



Client Information

Client Information

Client Name: Client Code:
Primary Client Contact: Client Contact Title:
Client Contact Email: Client Contact Phone:

Security Information

Approved Email Domain List:
@clientdomain.com, @anotherdomain.com, @milliman.com
Approved Email Exception List:
blah@blah.com

Billing Information

Primary Consultant: Primary Consultant Email:
Office: Profit Center:
Choose an Office

Client Users

User Name Search

Last, First (Consultant)
first.last@milliman.com

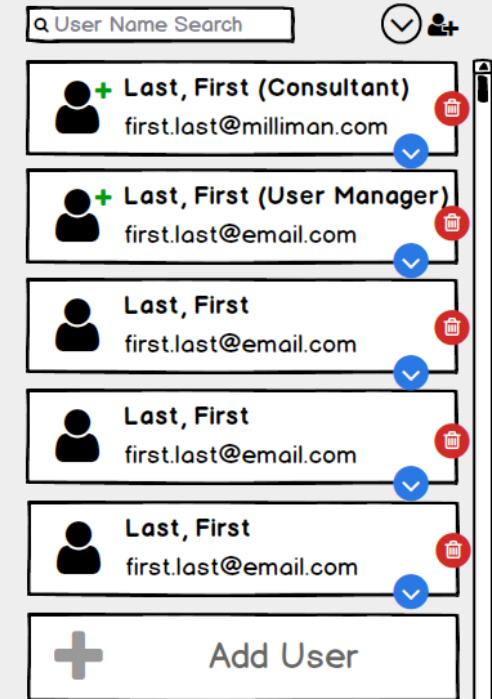
Last, First (User Manager)
first.last@email.com

Last, First
first.last@email.com

Last, First
first.last@email.com

Last, First
first.last@email.com

Add User



Client Administration

Client Tree

Client Name Search +

- Top Level Client**
0273PRM
- Sub Client Name**
0273PRM
- Sub Client Name**
0273PRM
- Top Client 2**
0273PRM

+ Create New Client

Client Information

Client Information

Client Name: Client Code:
Primary Client Contact: Client Contact Title:
Client Contact Email: Client Contact Phone:

Security Information

Approved Email Domain List: @clientdomain.com, @anotherdomain.com, @milliman.com
Approved Email Exception List: blah@blah.com

Billing Information

Primary Consultant: Primary Consultant Email:
Office: Choose an Office Profit Center:
SAVE CHANGES

Client Users

User Name Search +

- Last, First (Consultant)
first.last@milliman.com
- Last, First (User Manager)
first.last@email.com
- Last, First
first.last@email.com
- Last, First
first.last@email.com
- Last, First
first.last@email.com

+ Add User

Milliman Access Portal

Hello, User Name

Client Administration

Client Tree

Client Name Search +

- Top Level Client**
0273PRM
- Sub Client Name**
0273PRM
- Sub Client Name**
0273PRM
- Top Client 2**
0273PRM

+ Create New Client

Client Information

Client Information

Client Name: Client Code:
Primary Client Contact: Client Contact Title:
Client Contact Email: Client Contact Phone:

Security Information

Approved Email Domain List: @clientdomain.com, @anotherdomain.com, @milliman.com
Approved Email Exception List: blah@blah.com

Billing Information

Primary Consultant: Primary Consultant Email:
Office: Choose an Office Profit Center:
SAVE CHANGES

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