

Add a service provider role to builder account

You can add a Service Provider to your builder account in the HBCF Portal.

When you give a Service Provider access, you choose a role. This decides what they can see and do in the Portal. The same role applies to all users linked to that Service Provider.

See our separate guide to [Add a new User Role to your builder account](#) for your employees.

Important: * Only users with "Manager" role can add/remove Service Providers.

Service Provider engagement

Use of a Service Provider for builders is optional.

icare HBCF added this feature to give builders choice. However, icare HBCF does not manage your relationship with your Service Provider.

icare HBCF will not be involved in any terms of service, SLAs, KPIs and remuneration between the Builder and their Service Provider. We do not manage, oversee, or take any responsibility for these arrangements.

Before adding a service provider to your account, we recommend you speak to them to:

- Agree on services, fees, and contract terms directly
- Confirm who will act as the main contact

For the avoidance of doubt - Service Providers are not engaged by and do not act for or on behalf of icare HBCF.

This guide shows you how to add a Service Provider to your builder account and choose a role as:

- Delegate
- Eligibility Assessment Delegate
- Finance user
- Clerical staff

About the user roles

User role	Will have access to	Designed for
Manager	All policy, eligibility, account management and accounting actions	Principal builder/Director or Senior Operations Manager <i>(internal role only)</i>
Clerical	Apply for and manage policy details	Builder employee <i>(internal role only)</i>
Financial	View transactions and update account details, including permission to pay for premiums using default payment details	Finance/Accounts <i>(internal)</i> Accountants <i>(external)</i>
Delegate	Apply and manage eligibility and policy, including permission to pay for premiums using default payment details	Brokers, or other chosen service provider <i>(external)</i>
Eligibility Delegate	Apply and manage eligibility only	Brokers, or other chosen service provider <i>(external)</i>
Not applicable	Not active – Users with role set to “Not Applicable” cannot access that builder’s account.	Any User role <i>(internal or external)</i>

What does "can manage users" mean?

The **Manager** role can:

- Allow and Remove users access to manage other users
- Remove any user account created by other users on a builder profile

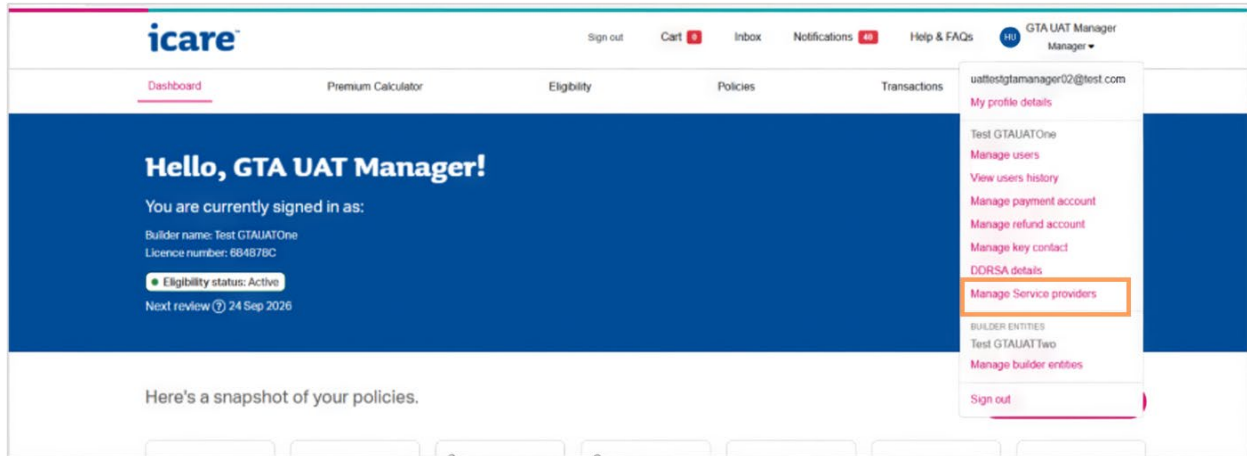
When a Manager allows a user to manage other users that means:

- **Delegate:** can “Add” and/or “Remove” a user with the same ABN as either a Delegate or Eligibility Delegate to a builder’s account.
- **Clerical:** can “Add” and “Remove” a user with a Clerical role to that builder’s account.

Important: If you don’t have permission to add users, ask the person with Manager role on your builder account to help you.

Add a service provider to your HBCF Portal account

- *Login* to the HBCF Portal using as a **Manager** *
- *Click* the **drop-down arrow** (top-right) next to Manager
- *Select* "**Manage service providers**"
- *Click* "**Add new service provider**"
- *Search* the Service Provider by ABN, ACN or Company Name and select



If you cannot find your Service Provider

- If you can't find your Service Provider, they may not be registered on the HBCF Portal yet.
- They must email enquiries.hbcf@icare.nsw.gov.au and request registration.

Assign User Role and Access

When you give a Service Provider access, you choose a role. This decides what they can see and do in the Portal. Make sure you only give people the access they need to keep your account secure.

For example, users with permissions to pay premiums can use any default payment details you agree to save on the portal.

Important: The same role access will apply to all users linked to that Service Provider

- *Click* the “+” next to “**About User roles**”, or see page (1) of this guide to learn more about each level of access and permissions
- *Select* the role type you want for your Service Provider

If you manage more than one builder entity:

- Choose a role appropriate for each business
- Select “**Not Applicable**” if you do not want them to access a builder entity

Approve Access

- *Read* the Terms and Conditions and *Click* Agree when ready
- *Click* “**Add new service provider**”

The Service provider (and their role) will now appear in your profile when you next click “Manage Service Providers”.

Remove a Service Provider

- Go to “**Manage Service Providers**” in the Portal
- Change their role to “**Not applicable**”

Service Providers can also request removal by emailing enquiries.hbcf@icare.nsw.gov.au