

# Adding Agency Users in the new TWIA Agent Portal

This job aid demonstrates how to add users in the new TWIA Agent Portal.

1. You must be an Agency Administrator to add an agency user to the TWIA system. To start, click on the Administration tab from the Agent Dashboard.

The screenshot shows the TWIA Agent Portal Dashboard. The top navigation bar has four tabs: Activities, Commission, Administration (highlighted with a red box), and Book Of Business. Below the tabs, the dashboard displays four summary cards: OPEN QUOTES (14), OPEN POLICY CHANGES (16), OPEN CANCELLATIONS (5), and OPEN RENEWALS (857). Below these cards, there is a section titled "Your Open Activities" which shows "No Activities found."

2. Select the Agency that is receiving the additional user. If you are an Agency Administrator, that agency will automatically appear on your screen under Agencies/ Locations. Select the agency where the new user will be added.

The screenshot shows the TWIA Agent Portal interface for the USAA Insurance Agency Inc. The top navigation bar has three tabs: Commission, Administration (highlighted with a red box), and Book Of Business. Below the tabs, there is a blue information box stating: "Changes made do not automatically update in our legacy Agent Portal. You may login to the legacy Agent Portal to make changes or contact TWIA at agentservices@twia.org." Below this, the agency details for USAA Insurance Agency Inc. are shown, including the TDI License Number: 00000000. There are four input fields for Primary Location Address, Mailing Address, Primary Contact, and Direct Deposit, each with a pencil icon for editing. Below these fields, there are two buttons: "+ Agency" and "Organization Administrators". Below the buttons, there is a section titled "Agencies/Locations" with a search bar. Below the search bar, there is a table with columns: Agency Name, Producer Code, Primary Contact, Phone Number, Email Address, and Status. The table contains two rows of data, both with "Active" status. The first row's Agency Name is highlighted with a red box.

3. Next, select +User.

The screenshot shows the TWIA Agent Portal interface for the Users section. The top navigation bar has two tabs: Administration (highlighted with a red box) and Book Of Business. Below the tabs, there is a pagination bar showing "1 - 25 of 123" with left and right arrows. Below the pagination bar, there is a section titled "Users" with a search bar. Below the search bar, there is a table with columns: First Name, Last Name, Username, Phone Number, Email Address, EFT Enabled, and Status. The "+ User" button is highlighted with a red box.



4. Enter the email address of the user you would like to add. Next, click Search to search for the user.

### Search User

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Email Address \*

5. If the user is not found in the system, you will get a message that says, “No user with matching email address found”, and you may proceed with adding the user. Enter the requested information in the fields with an \*, select the role(s) you want the user to have in the agency and then click Submit. \*\*\*\*If you are unable to add the user, please contact [agentservices@twia.org](mailto:agentservices@twia.org) for assistance.

**No user with matching email address found**

Email Address \*

### New User

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First Name \*  Last Name \*

Email Address \*  Phone Number \*

### Roles

	Name	Description
<input type="checkbox"/>	EFT Enabled	Permission to make EFT Payments for EFT Enabled Agencies/Locations.
<input checked="" type="checkbox"/>	Agency User	Permission to perform policy transactions like New Submission, Renewal, Policy Change, Policy Change etc.
<input type="checkbox"/>	Agency Admin	Permission to view agency details and manage users, update address etc.



6. The new user has been added to the agency. The new user will receive an email from TWIA so they can finalize their set up. The message in blue lets you know you may need to add the user in the older TWIA Agent Portal if you have not already done so. Until all of the renewing TWIA policies move over to the new Agent Portal, you may still need access to the older Agent Portal.

Changes made do not automatically update in our legacy Agent Portal.  
You may login to the legacy Agent Portal to make changes or contact TWIA at [agentservices@twia.org](mailto:agentservices@twia.org).

TDI License Number: 00000000

Primary Location Address:

Mailing Address:

Primary Contact:

Direct Deposit:

+ Agency

Organization Administrators

Agencies/Locations

Search:

Agency Name	Producer Code	Primary Contact	Phone Number	Email Address	Status
					Active
					Active

