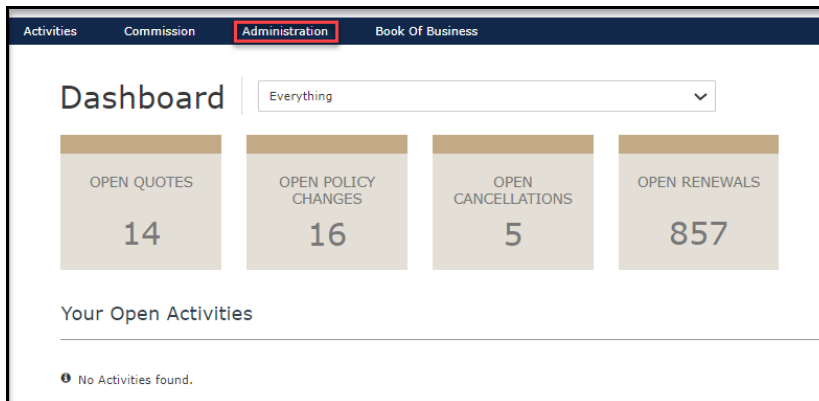


Adding Agency Users in the New TWIA Agent Portal

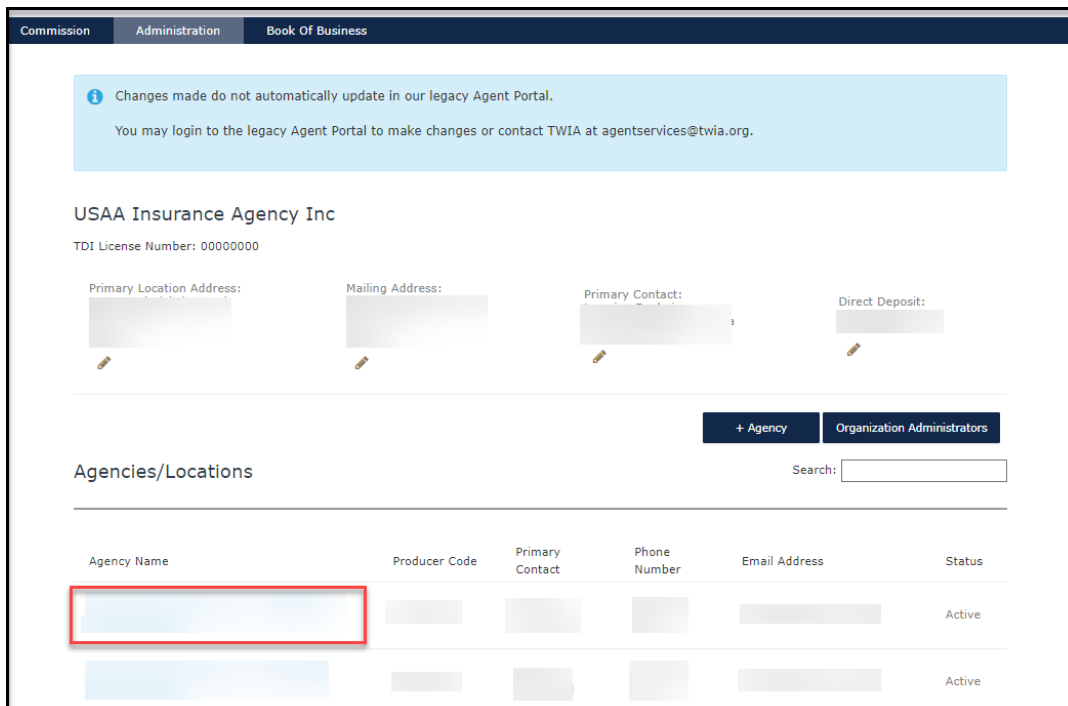
This job aid demonstrates how to add users and assign roles in the TWIA Agent Portal.

ADDING AN AGENCY USER

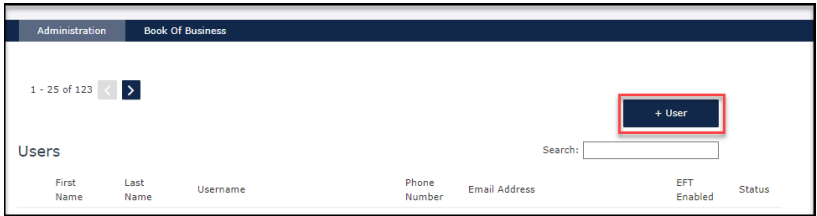
1. You must be an Agency Administrator to add an agency user to the TWIA system. To start, click on the Administration tab from the Agent Dashboard.



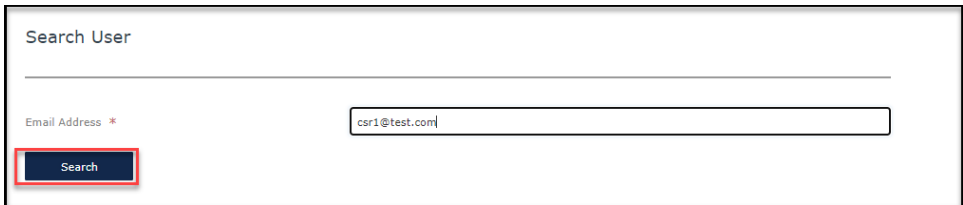
2. Select the Agency that is receiving the additional user. If you are an Agency Administrator, that agency will automatically appear on your screen under Agencies/ Locations. Select the agency to which the new user will be added. *****Be sure to wait until the agency information can load at the top of the screen before proceeding to the next screen.**



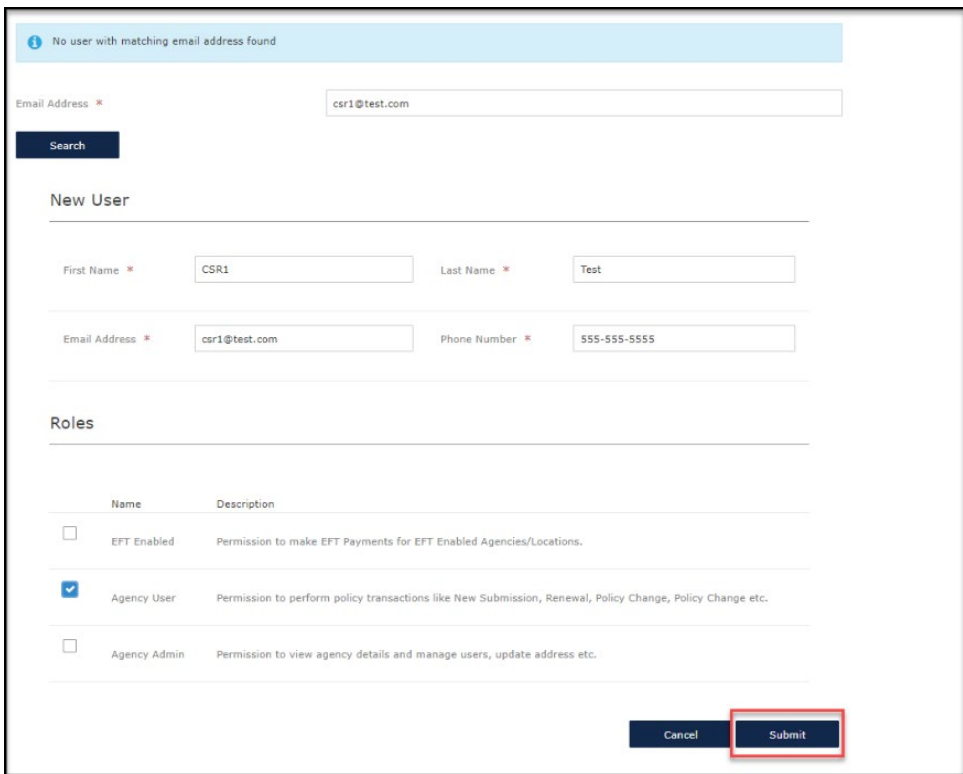
3. Next, select +User.



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



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 for assistance.



6. A new user has been added to the agency. The new user will receive an email from TWIA so they can complete 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 renewing TWIA policies move 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.

Agency Name: [Redacted]
TDI License Number: 00000000

Primary Location Address: [Redacted] Mailing Address: [Redacted] Primary Contact: [Redacted] Direct Deposit: [Redacted]

+ Agency Organization Administrators

Agencies/Locations Search: [Redacted]

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

UPDATING AGENCY USER TO FINANCIAL ADMIN

1. Click on Administration and then select "Organization Administration." **Only an Organization Administrator may add the Financial Admin role to an agency user.**

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.

Agency Name: [Redacted] Agency, Inc
TDI License Number: [Redacted]

Primary Location Address: [Redacted] Mailing Address: [Redacted] Primary Contact: [Redacted] Direct Deposit: [Redacted]

+ Agency Organization Administrators

Agencies/Locations Search: [Redacted]

Agency Name	Producer Code	Primary Contact	Phone Number	Email Address	Status
[Redacted] Inc - PRODUCER GROUP	[Redacted]	[Redacted]	[Redacted]	[Redacted]	Active



2. You may edit a current Organizational Admin on this screen to give the person financial rights or give a regular agency user access. In this case, we will show to give financial access to a regular agency user. Start by selecting “+User.”

Agency, Inc - MASTER GROUP

Mailing Address Primary Contact Status Active

+ User

Organization Administrators Search:

First Name	Last Name	Username	Phone Number	Email Address	EFT Enabled	Status
					No	Active
					No	Active

3. Next, enter the user’s email address where indicated and select “Search.”

Agency, Inc - MASTER GROUP

Mailing Address Primary Contact Status Active

Search User

Email Address * Search

4. Verify the info returned and then choose, “Select.”

Agency, Inc - MASTER GROUP

Mailing Address Primary Contact Status Active

Search User

Email Address * Search

Select User to Add as an Organization Admin

First Name	Last Name	Username	Phone Number	Email Address	EFT Enabled	Status
					No	Active

Select



5. Next select, "Submit."

Agency, Inc - MASTER GROUP

Mailing Address Primary Contact Status Active

Search User

Email Address *

Search

Select User to Add as an Organization Admin

	First Name	Last Name	Username	Phone Number	Email Address	EFT Enabled	Status
Select						No	Active

Roles

Name	Description
Agency User	Permission to perform policy transactions like New Submission, Renewal, Policy Change, Policy Change etc.

Cancel Submit

6. Click on "Organization Administrators."

Agency, Inc

TDI License Number

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



7. Click on the "Username" of the user just added.

Agency, Inc - MASTER GROUP

Mailing Address: [Redacted] Primary Contact: [Redacted] Status: Active

+ User

Organization Administrators Search: [Input Field]

First Name	Last Name	Username	Phone Number	Email Address	EFT Enabled	Status
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	jparker	[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]

8. Select "Edit" to update the user's agency roles. Please note this person is currently listed as an agency user who can perform policy transactions only.

Agency, Inc - MASTER GROUP

Mailing Address: [Redacted] Primary Contact: [Redacted]

[Redacted]

User Name: [Redacted] Status: Active

First Name: [Redacted] Last Name: [Redacted]

Email Address: [Redacted] Phone Number: [Redacted]

Roles

Name	Description
Agency User	Permission to perform policy transactions like New Submission, Renewal, Policy Change, Policy Change etc.



9. On this screen, you can update the roles you would like the user to have. In this case, we are adding “Financial Admin” to the agency user’s role. When ready, select “Submit.” The roles should now be updated for this user. Please also note: a brief description of each organizational admin role is shown on the screen below. You will not see these options when you are adding a user at the agency level. These options are only shown at the organizational level. **Also, be extra cautious as to who you are giving the Agency Admin and Organization Admin roles to since these roles carry editing options related to the agency and agency users.**

Agency, Inc - MASTER GROUP

Mailing Address Primary Contact

User Name: jparker Status: Active

First Name * Last Name *

Email Address Phone Number *

To update the email address, please send your request to agentservices@twia.org.

Roles

Name	Description
<input type="checkbox"/> Agency Admin	Permission to view agency details and manage users, update address etc.
<input checked="" type="checkbox"/> Financial Admin	Permission to view and update bank account details for Direct Deposit of commissions
<input checked="" type="checkbox"/> Agency User	Permission to perform policy transactions like New Submission, Renewal, Policy Change, Policy Change etc.
<input type="checkbox"/> Organization Admin	Permission to view entire organization and perform administration activities like manage Agencies/Locations, manage all Users etc.
<input type="checkbox"/> EFT Enabled	Permission to make EFT Payments for EFT Enabled Agencies/Locations.

Cancel Submit

