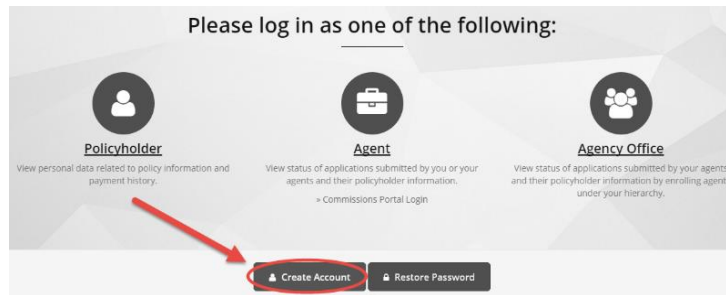


# How-To Guide for Agent Portal

## To Create an Account for the Agent Portal:

1. Create an account by clicking on the Create Account button in the center of the page.



Create New Account

Enter your login, account and contact information to create new account. Then enter the image code and click the "Create Account" button.

Login Information

Login Type:  \* Required

User Name:  \* Required

New Password:  \* Required

Confirm Password:  \* Required

Website Account Holder / Agent Information

Agent Number:  \* Required

First Name:  \* Required

Last Name:  \* Optional

Tax ID / SSN:  \* Required

Business ZIP:  \* Required

Contact Information

Phone Number:  \* Optional

Email Address:  \* Required

Automatic Registration Protection

Enter Code From Image:  \* Required

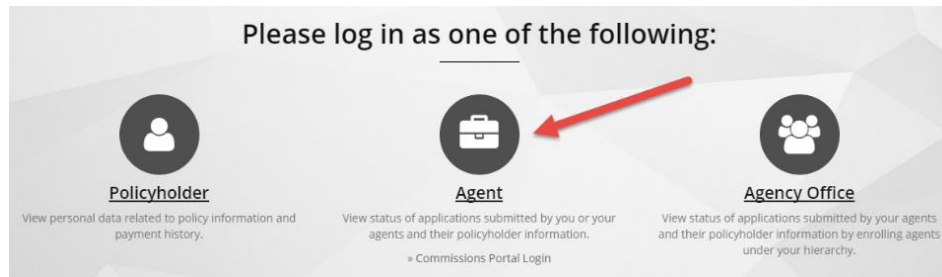
Reload Image

- a. Login Type = Agent / Agency
- b. User Name = Create your own
- c. New Password = Create your own. Must be at least 6 characters, one upper case and one lower case
- d. Confirm Password = Re-enter your password
- e. Agent Number = This is the number you were assigned when contracted
- f. First Name = Enter your first name
- g. Last Name = Enter your last name
- h. Tax ID / SSN = Use either your SSN or Tax ID number you used on contracting paperwork
- i. Business ZIP = Enter your business zip code
- j. Phone Number = This is optional
- k. Email Address = Use the email address you used on contracting paperwork
- l. Enter the code from the image

2. Click on Create Account

## To Log-In as an Agent and set Agent Preferences

1. Select the Agent icon by clicking on the suitcase icon



2. Your login information is as follows:

- a. Username = Use the username you created
- b. Email Address = Use the email address you entered when creating your account
- c. Password = use the password you created for this site

**\*Note:** This username and password for this site is separate from the Commissions Portal Login username and password you were assigned during contracting.

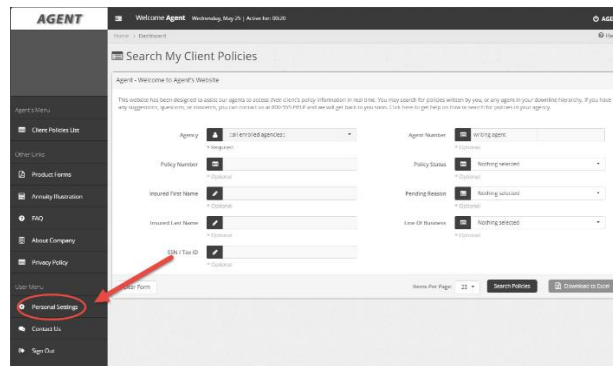
3. Click on Login. You will be directed to the Client Policies List page as the home page for the portal. To see all policies associated with your agent number, click on "Search Policies."

**\*Note:** For agency offices or those with downline agents, you can search policy listings by specific agent number by using the "Agent Number" search function as a quick search option. You will be required to enter the agent number in each time you search using this function. For instructions on how to permanently add agent numbers as a search option, go to the header titled "To Enroll Downline Agents".

4. Agent preferences can be found under the "Personal Settings" tab on the left side of the screen. Here you can update your email address, change how your name is displayed, as well as change your password. You can also enroll downline agents as a search option for displaying policy information.

## To Enroll Downline Agents

1. Select the Personal Settings Option



2. In the "Enroll Agent Number" section you will need to add your agent writing number, Tax ID or Social Security Number, and your zip code to verify your account with our system. First Name/Company and Last Name are not required fields but are recommended, especially for Agency Offices.

**\*Note:** This information must match the information submitted on your contracting forms to access any information.

- a. Agent Number = Enter your assigned Agent Writing Number
- b. First Name / Company = Enter your First Name or Company/Agency Name
- c. Last Name = Enter your Last Name
- d. Tax ID / SSN = Enter the Tax ID number or Social Security number you used during contracting.
- e. ZIP = Enter the Zip code listed on your contracting paperwork.

Enroll Agent Number

A AGENT NUMBER B First Name / Company C Last Name D Tax ID / SSN E ZIP Enroll Agent

- Click on Enroll Agent. The agent information will now be available under the “My Agent Numbers” section. If you are part of an Agency Office, you can repeat step 5 to add additional agents.

My Agent Numbers  
To access policy information, each agent will need to enroll their agent or agency number by entering their agent number, tax ID and business ZIP code. We do not validate names, last name is not required. Agency owners will have access to their downline policies once they are enrolled thus they do not need to enroll every single agent from their hierarchy.

| Agent Number | Agent Name / Company Name | SSN / Tax ID | Zip   | Add / Rem |
|--------------|---------------------------|--------------|-------|-----------|
| ACLREST00    | Test Test                 | 123456789    | 84111 | Remove    |

Enroll Agent Number

AGENT NUMBER First Name / Company Last Name Tax ID / SSN ZIP Enroll Agent

\*Note: You can also update your Profile information and change your password on this page as well. The Profile data refers to the person who created the account and is not associated with the agent information. This is to allow Agency Offices to create multiple accounts to monitor agent business.

## To Access Client Policies List

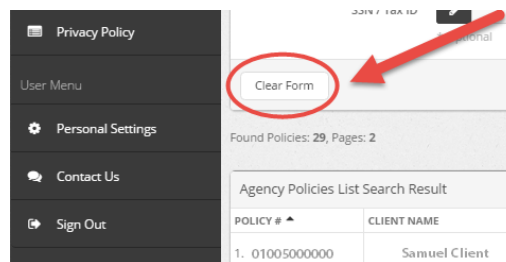
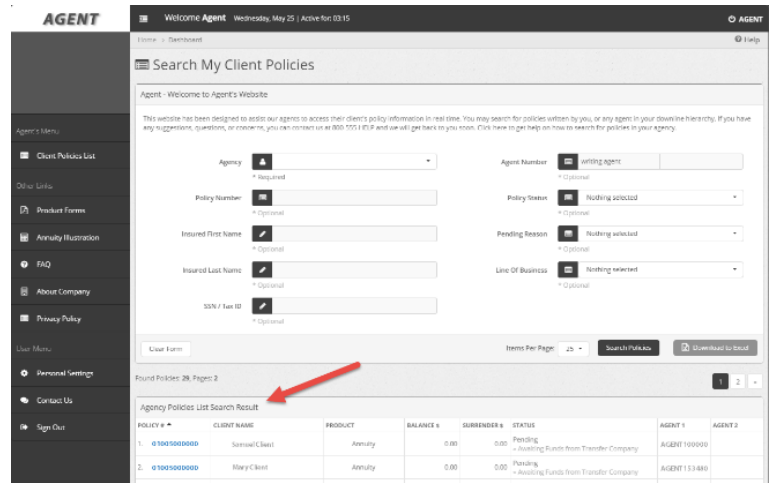
- Select the Client Policies List option from the Agent’s Menu on the left side of the screen. A menu will appear with several input or drop down options available for use while searching. You can use these items to narrow your search, or to see all policies, click on “Search Policies”. All your policies or those in your downline will be displayed.
  - Agency = Click on drop down option to select correct agent number. If you have enrolled multiple downline agents, you will see each agent number listed and can select one.
  - Policy Number = Client’s Policy Number
  - Insured First Name = Insured First Name
  - Insured Last Name = Insured Last Name
  - SSN / Tax ID = Policy Holder SSN or Tax ID
  - Agent Number = Select “Writing Agent” if you wish to see only the business submitted by the agent listed in option A, or “Include the Hierarchy” if you wish to see all the downline business as well. You can also search by agent number here by entering the full agent writing number in the box to the right of the search option.
  - Policy Status = This option allows you to narrow your search based on the status of the policy.
  - Pending Reason = This option is available so you can easily see why a policy is pending
  - Line of Business = Only applicable if you are contracted to sell more than one type of product
- Click on “Search Policies” to show the items on the webpage below, or “Download to Excel” to export the list.

- The Agency Policies List Search Result window will appear below the search options. This will give you a snapshot view of the status of the policies.

*\*Note: You can also click on any of the column headings to change the default sort function. Clicking on it again will change the sort from ascending to descending.*

- Click on the blue Policy Number hyperlink to view policy details, including policy data, deposits, interest history, transaction summary and details, and policy notes.

- To start a new search, click on the “Clear Form” button below the drop down options to reset to default settings.



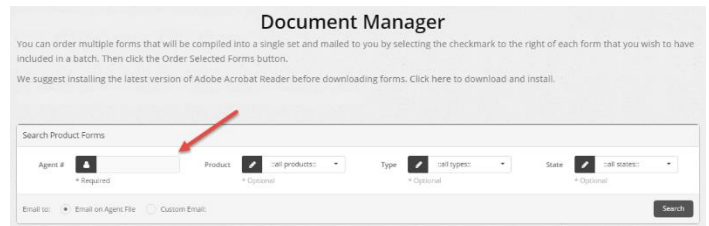
## To Access and Order Product Forms

- Select the Product Forms option from the Agent’s Menu on the left side of the screen. A new window will open.
- Use the input and search options to select the forms you need.

- Agent # = Re-enter your agent number.

*\*Note: This item is required. All other items are optional and available to narrow your search.*

- Product = Select the product you need
- Type = Select the type of form. The forms are separated into three sections; Application Materials, Marketing Materials, Policy Service Forms.



*\*Note: Materials that can be ordered have check box that can be selected in the “Order” column on the left side. Click on the check box and then click on “Order Selected Forms” at the bottom of the page and follow the directions to order.*

- State = Select the purchase state for Application or Marketing Materials and the resident state for Policy Service Forms.

- Click on Search. Forms will display in the window below the search options.

- Several viewing options will appear under the “Action” tab on the right side of the screen.

- Download = The document will open in another window for viewing or to download.
- Email = Click on this link to quickly send the form to your email address on file.





*\*Note: If you wish to change the email address the form will be sent to, please click the radial button next to “Custom Email” under the search options and enter your alternative email address PRIOR to clicking on the email link.*

## Document Manager

You can order multiple forms that will be compiled into a single set and mailed to you by selecting the checkmark to the right of each form that you wish to have included in a batch. Then click the Order Selected Forms button.

We suggest installing the latest version of Adobe Acrobat Reader before downloading forms. [Click here to download and install.](#)

Search Product Forms

|  |   |   |  |
|--|---|---|--|
| Agent # <input type="text"/> <br>* Required | Product <input type="text"/>  all products<br>* Optional | Type <input type="text"/>  all types<br>* Optional | State <input type="text"/> <br>* Optional |
|--|---|---|--|

Email to:  Email on Agent File  Custom Email:

