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.

Activities	Commission	Administration Book	Of Business	
Da	shboard	Everything		~
C	DPEN QUOTES	OPEN POLICY CHANGES 16	OPEN CANCELLATIONS	OPEN RENEWALS
You	r Open Activiti	es		
Ø 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 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.

ssion Administratio	on Book Of Busines	s				
<ol> <li>Changes made</li> </ol>	do not automatically upo	late in our legacy Age	ent Portal.			
You may login t	o the legacy Agent Porta	l to make changes or	contact TWIA a	agentservices@tw	via.org.	
USAA Insuranc	e Agency Inc					
TDI License Number: 0	000000					
Primary Location Add	ress: Ma	iling Address:	Pi	imary Contact:		Direct Deposit:
					3	
dir.	đ	۶		1		<i>G</i>
					+ Agency	Organization Administrators
Agencies/Locat	tions				Search:	
Agency Name		Producer Code	Primary Contact	Phone Number	Email Address	Status
						Active



## 3. Next, select +User.

Administrati	on Book O	f Business			
1 - 25 of 123	< >				+ User
Users				Search:	
First Name	Last Name	Username	Phone Numbe	Email Address	EFT Status Enabled

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

Search User		
Email Address *	csr1@test.com	

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. You may also use the above steps to add an existing agency user to an additional agency location.

No user	with matching ema	il address found				
ddress	*		csr1@test.com			
Search						
New L	Jser					
First N	lame *	CSR1		Last Name *	Test	
Email	Address *	csr1@test.com		Phone Number *	555-555-5555	
oles	Name	Description				
	EFT Enabled	Permission to make I	EFT Payments for I	EFT Enabled Agencies/Loca	tions.	
~	Agency User	Permission to perform	m policy transactio	ns like New Submission, R	enewal, Policy Change, Policy	Change etc.
	Agency Admin	Permission to view a	gency details and	manage users, update add	ress etc.	
					Cancel	Submit



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.

You may login to the legacy A	gent Portal to make changes or	r contact TWIA	at agentservices@tv	via.org.		
I License Number: 00000000						
Primary Location Address:	Mailing Address:		Primary Contact:		Direct Deposit:	
8	1		8		ø	
				+ Agency	Organization Adm	inistrato
gencies/Locations				Search	:	
Agency Name	Producer Code	Primary Contact	Phone Number	Email Address		Statu
					а	Activ
						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.

rimary Location Address: Mailing Address: Primary Contact: Direct Deposit:  Primary Contact: Direct Deposit:  + Agency Organization Administrators search:	jencies/Locat	ions					
rimary Location Address: Primary Contact: Direct Deposit:						+ Agency Organization	on Administrators
Agency, Inc	Age License Number: rimary Location Add	ncy, Inc	iling Address:	Pri	mary Contact:	Direct De	posit:



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, I	inc - MASTER	GROUP					
Mailing Addro	Mailing Address		Primary Contact			Status Active		
1			ø					
Organizatio	on Admini	istrators				Search:	+ U	ser
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 - MA	STER GROUP	
Mailing Address	Primary Contact	Status Active
Search User		
Email Address * Search		

4. Verify the info returned and then choose, "Select."

Agency,	Inc - MASTE	R GROUP				
Mailing Address		Primary	Contact		Status Active	
1		8				
Search User						
Email Address #						
Search						
Select User to A	Add as an Or	ganization Adm	in			
						_
	First Last Name Name	Username	Phone Number	Email Address	EFT Enabled	Status
Select					No	Active



## 5. Next select, "Submit."

Agency	, Inc - MASTI	ER GROUP			
Mailing Address		Primary Co	ontact	Status Active	
Search User					
Email Address * Search					
Select User to	First Last	rganization Admir	Phone	FFT	
Salart	Name Nam	Username	Number Email Address	Enabled	status
Roles				- UN P	
Name Agency User	Description Permission to perfor	n policy transactions like Ne	w Submission, Renewal, Policy Change, Policy	Change etc.	
				Cancel Submit	

6. Click on "Organization Administrators."

Agency, Inc				
Primary Location Address:	Mailing Address:	Primary Contact	: Direct De	posit:
ø Agencies/Locations	σ		+ Agency Organizati Search:	on Administrators
Agency Name	Producer Code	Primary Phone Contact Numbe	r Email Address	Status
				Active



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

Agency, I	nc - MASTER GF	ROUP				
Mailing Address		Primary Contact			Status Active	
8						
Organization Admini	strators			Search:	+ U	ser
First Last Name Name	Username	Phone Number	Email Address		EFT Enabled	Status
	jparker					
						)

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.

Ag	ency, Inc - MASTER GROUP	
Mailing Address	-^-)	Primary Contact
User Name		Edit Deactivate Status Active
First Name		Last Name
Email Address		Phone Number
Roles		
News	Description	
Name		



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.

iling Ad	dress		Primary Contact		
•			ø		
User	Name	jparker		Status	Active
First I	Name *			Last Name *	
Email	Address	states and your request to		Phone Number *	
agen	tservices@twia.org.	iss, piedse senu your requese e-			
Roles	3				
Roles	Name Agency Admin	Description Permission to view agency details	and manage users, upda	ate address etc.	
Roles	Name Agency Admin Financial Admin	Description Permission to view agency details Permission to view and update ba	and manage users, upda nk account details for Di	ate address etc. rect Deposit of comr	nissions
	Name Agency Admin Financial Admin Agency User	Description Permission to view agency details Permission to view and update ba Permission to perform policy trans	and manage users, upda nk account details for Di actions like New Submis	ate address etc. rect Deposit of comr ision, Renewal, Polici	nissions y Change, Policy Change etc.
Roles	Name       Agency Admin       Financial Admin       Agency User       Organization Admin	Description Permission to view agency details Permission to view and update ba Permission to perform policy trans Permission to view entire organiza manage all Users etc.	and manage users, upda nk account details for Di actions like New Submis ition and perform admini	ate address etc. rect Deposit of comm ssion, Renewal, Polic istration activities lik	nissions y Change, Policy Change etc. :e manage Agencies/Locations,
	Name       Agency Admin       Financial Admin       Agency User       Organization Admin       EFT Enabled	Description Permission to view agency details Permission to view and update ba Permission to perform policy trans Permission to view entire organiza manage all Users etc.	and manage users, upda nk account details for Di actions like New Submis ition and perform admini	ate address etc. rect Deposit of comr ssion, Renewal, Polic istration activities lik es/Locations.	nissions y Change, Policy Change etc. æ manage Agencies/Locations,
	Name       Agency Admin       Financial Admin       Agency User       Organization Admin       EFT Enabled	Description Permission to view agency details Permission to view and update ba Permission to perform policy trans Permission to view entire organiza manage all Users etc. Permission to make EFT Payments	and manage users, upda nk account details for Di actions like New Submis ition and perform admini	ate address etc. rect Deposit of comr ision, Renewal, Polic istration activities lik es/Locations.	nissions y Change, Policy Change etc. :e manage Agencies/Locations, :ancel Submit

