

Agency Administrator Reference Guide



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Staying up to date on what's going on with your insureds is important – we get it! That's why we developed the Agent Portal with you in mind – providing you the latest updates on your insureds' policy, claim or billing information at your fingertips. With the Agent Portal, agents can:

- Generate loss runs over multiple years
- View a personalized dashboard showing the most relevant information on your ICW Group insureds
- Receive alert notifications for submissions, policies and claims
- Get single sign-on access to Snap
- And more!

This guide provides you, the Agency System Administrator, instructions on how to easily manage your agency's employee access and permissions. As an Agency System Admin, you can:

- Grant or remove access to the Agent Portal for your agency employees
- Edit existing Agent Portal users
- View the latest log in activity
- Send a reset password link to your agency employees

As your partner, we look forward to continually improving the way we do business together.

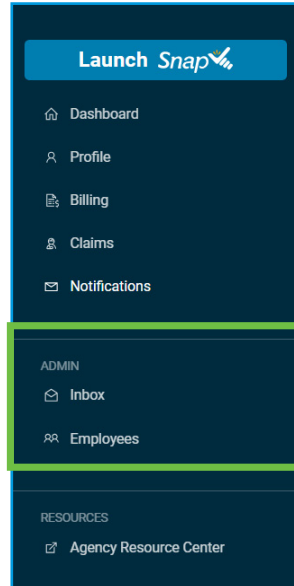
Sincerely,
The Agent Portal Support Team

agentsupport@icwgroup.com

ACCESSING THE AGENCY ADMIN MENU

Those with Administrator privileges will notice an **Admin** section in the left navigation. This contains your:

- **Inbox:** Which includes requests from users in your agency (i.e. new user access, new locations, and email changes)
- **Employees:** A list of employees at your agency, their access levels, permissions, and agent portal status



ADDING NEW USERS

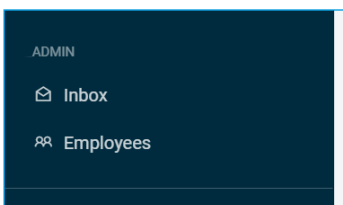
As an Agency Administrator, you can manage access to the Agent Portal for your agency. Users can gain access by:

- Self-Registration: Agents fill out a form online and submit a request to Agency System Administrators to approve
- System Administrators can add a new user directly in the Agent Portal

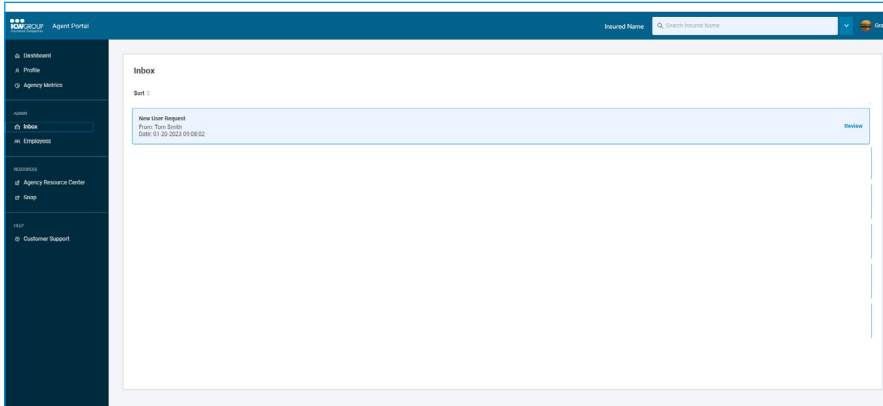
SELF-REGISTRATION

After the new user has submitted their request, you'll receive an email notification. To review the request:

1. Log into Agent Portal.
2. From the **left navigation**, click on **Inbox**.



- Then, select the **New User Request** item you wish to review.

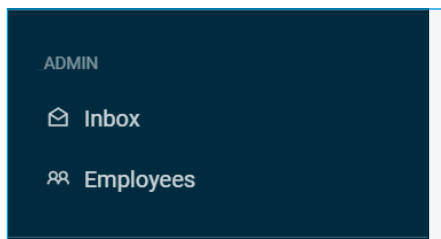


- The **New User Request Wizard** launches. Follow the instructions in the Wizard to approve or reject this request. Note: Once you have approved or rejected the **New User Request**, the request will be removed from the Inbox. In this way, the Inbox can be used as your to-do list of administrative tasks.

ADDING A NEW USER USING THE EMPLOYEES PAGE

You can add all your agency's users from the Agent Portal's Employees page directly.

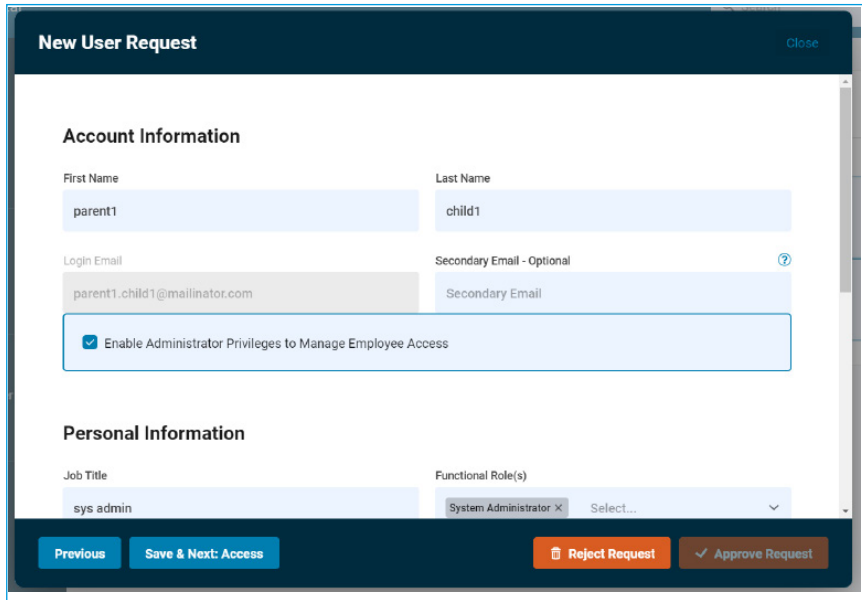
- From the **left navigation**, click on **Employees**.



- On the **Employees** page, click the **Add Employee**. The **New User Request Wizard** launches.

THE NEW USER REQUESTS PANEL

The **New User Requests Wizard** will walk you through the steps needed to add a new user to the Agent Portal.

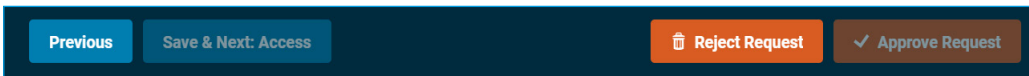


The screenshot shows a 'New User Request' form with the following sections and fields:

- Account Information**
 - First Name: parent1
 - Last Name: child1
 - Login Email: parent1.child1@mailinator.com
 - Secondary Email - Optional: (empty)
 - Enable Administrator Privileges to Manage Employee Access
- Personal Information**
 - Job Title: sys admin
 - Functional Role(s): System Administrator (selected)

At the bottom of the form are four buttons: 'Previous', 'Save & Next: Access', 'Reject Request', and 'Approve Request'.

Note: If you are launching the New User Request Wizard from the Inbox screen, the fields will be pre-populated from the user or ICW Group team member who entered them. The **Reject Request** button will appear at the bottom of the screen. This button is used to reject this user request and remove it from the **Inbox** screen.

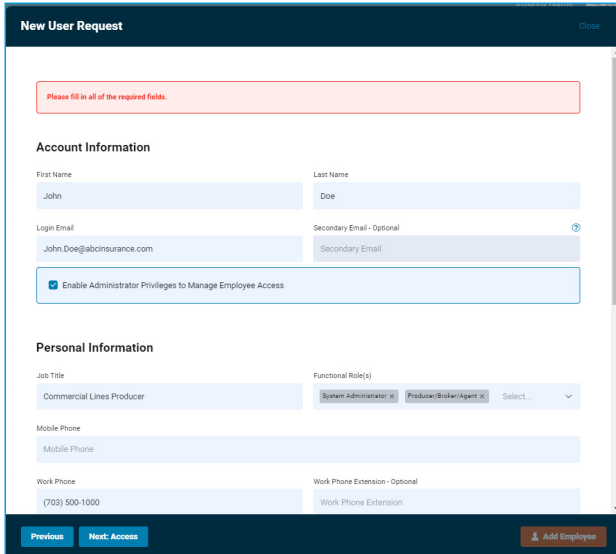


This image shows a close-up of the bottom of the form, highlighting the four action buttons: 'Previous', 'Save & Next: Access', 'Reject Request', and 'Approve Request'.

Note: Although the fields are pre-populated, please verify the information within them and proceed through the remaining steps until the Approve Request button becomes active.

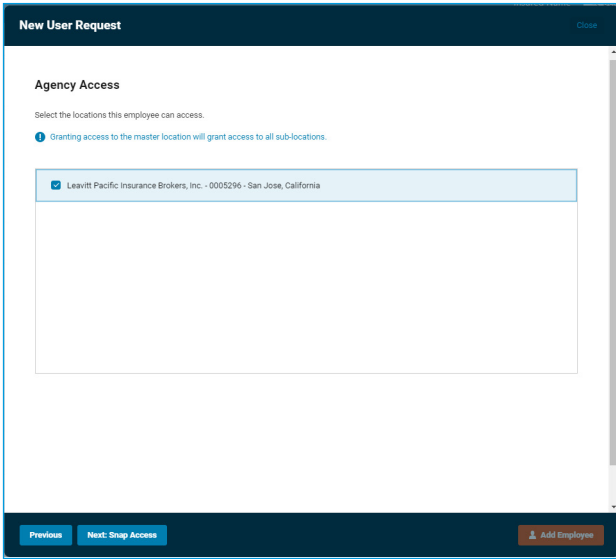
THE NEW USER REQUESTS PANEL

1. **Account information** page: Enter the employee's contact information including the first and last name, functional role, title, phone, address, and email(s):



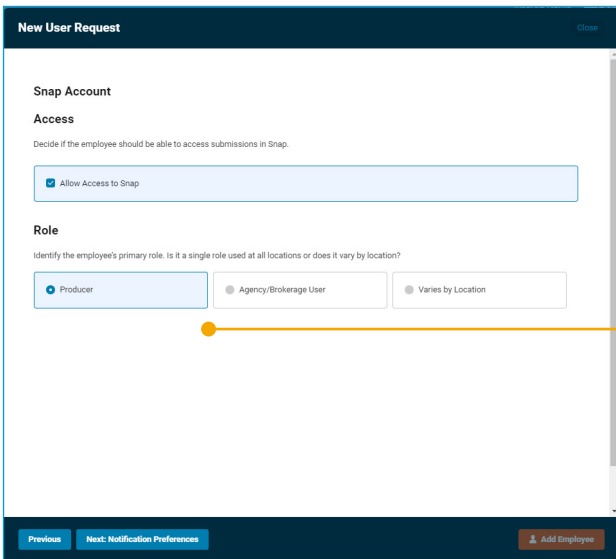
- Note: The Employee's primary email is what the employee will use to log into the Agent Portal so it must be unique. The secondary email is optional and can be used only if the agency wants all communications to be distributed to a shared inbox. If there is no shared inbox, leave this field blank.
 - If this user should also be a system administrator for your agency, check the **Enable Administrator Privileges** checkbox to manage employee access. If the user is made an administrator, they will be an administrator for every code they are granted access to. A user cannot be limited to administering particular codes.
 - The functional role is considered the primary role or roles they conduct with Workers' Compensation. The most common functional roles are Account Executive/Manager, CSR, Producer/Broker/Agent. You may select more than one functional role.
2. Select **Next: Access** after all mandatory fields are populated.

- On the **Agency Access** page, select all the locations that the user will need to access. Note: At least one agency location is required to be able to save and proceed to the next part of the wizard. Only the locations you have permissions to view will be visible in this window.



The screenshot shows the 'New User Request' form with the 'Agency Access' section. The title is 'New User Request' with a 'Close' button. Below the title is the heading 'Agency Access' and the instruction 'Select the locations this employee can access.' A note states: 'Granting access to the master location will grant access to all sub-locations.' A list of locations is shown with a checkbox selected for 'Leavitt Pacific Insurance Brokers, Inc. - 0005296 - San Jose, California'. At the bottom, there are buttons for 'Previous', 'Next: Snap Access', and 'Add Employee'.

- When complete, click on the **Next: Snap Access** button.
- Snap Access:** Within the Snap Account page, click the checkbox if the user will need access to Snap. If the user should not have access to Snap leave this field blank. Regardless of Snap access, select a role for the user, you may choose either **Producer or Agency/Brokerage User**.



The screenshot shows the 'New User Request' form with the 'Snap Account' section. The title is 'New User Request' with a 'Close' button. Below the title is the heading 'Snap Account' and the sub-heading 'Access'. The instruction is 'Decide if the employee should be able to access submissions in Snap.' A checkbox is checked for 'Allow Access to Snap'. Below this is the 'Role' section with the instruction 'Identify the employee's primary role. Is it a single role used at all locations or does it vary by location?'. Three radio buttons are present: 'Producer' (selected), 'Agency/Brokerage User', and 'Varies by Location'. At the bottom, there are buttons for 'Previous', 'Next: Notification Preferences', and 'Add Employee'.

Select **Producer** for users who are responsible for producing the business (also known as 'agents').

Select **Agency/Brokerage User** for users who are typically responsible for managing the submission or policy during the life cycle (also known as Account Executives, Marketing or CSRs).

- When complete, select **Next: Licenses**.
- License Information:** This form is optional. Input any individual state licenses held by the user for which they plan to do business with ICW Group.

The screenshot shows a 'New User Request' window with a 'Licenses' section. A single button labeled '+ Add License' is visible within a text input area. At the bottom of the window, there are three buttons: 'Previous', 'Next: Review', and 'Add Employee'.

- When complete, click on the **Next: Review** button.
- Review all the information. If you need to modify any of the information, use the **Previous** button at the bottom of the Wizard.

The screenshot shows the 'Review the information before approving the request' section of the 'New User Request' form. It contains several sections of input fields:

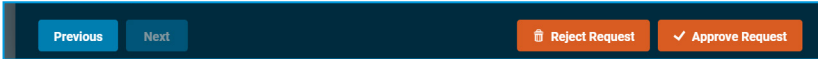
- Personal Information:** First Name (John), Last Name (Doe), Functional Role (System Administrator, Producer/Broker/Agent), Job Title (Commercial Lines Producer), Login Email (John.Doe@abcinsurance.com), Secondary Email, Mobile Phone, Work Phone ((703) 500-1000), and Work Phone Extension.
- Physical Address:** Physical Address Line 1 (1 Main Street), Physical Address Line 2, State (CA), City (San Diego), and Zip Code (92128).
- Mailing Address:** Mailing Address Line 1 (1 Main Street) and Mailing Address Line 2.

At the bottom of the window, there are two buttons: 'Previous' and 'Add Employee'.

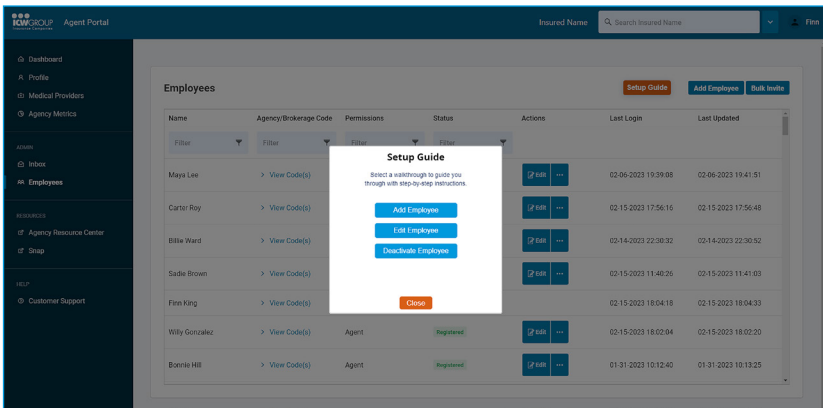
10. If completing from the **Add Employee** action, click **Add Employee**.



Or if completing from the Inbox, click **Approve Request**.



11. The User will receive an email with instructions on logging in and setting up a new password.



EMPLOYEE ACCESS DASHBOARD

The Employees dashboard lists all users within your agency location(s) identifying the status for each employee.

You can filter the Employee list by Name, Agency/Brokerage Code, Permission, or Status. To use the filters, start typing in the Filter box. Click the X next to the filters you create if you want to remove them.

