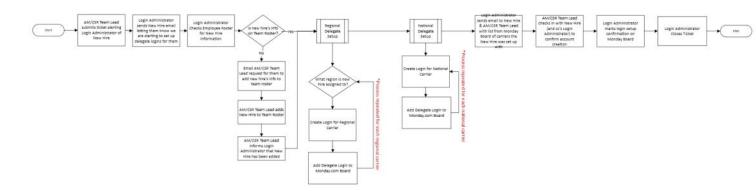
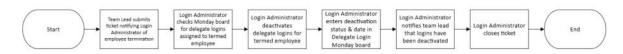
Friday, January 10, 2025 11:58 AM

New Hire Delegate Login Process Map Last Updated: 1/9/2025



Termed Employee Delegate Deactivation Process Map

Last Updated: 1/9/2024



Deactivation process will be started within 1 business day from receipt of ticket and completed within 5 business days.

Carrier Login Tracking

Friday, March 21, 2025 1:33 PM

Link	https://acrisure-corp.monday.com/boards/7486259097		
Description	This board tracks the agency logins and main producer logins (i.e. Brian, Bethany, Kourtney Kolenda).		

Delegates Login Tracker

Friday, March 21, 2025 1:35 PM

Link	https://acrisure-corp.monday.com/boards/7746655872
Description	This board tracks delegate logins (i.e. AM's, AC's, Team Leads, etc.)

TEMPLATE

Wednesday, January 29, 2025 11:06 AM

Delegate Login Creation Instructions

1.

Delegate Login Deactivation Instructions

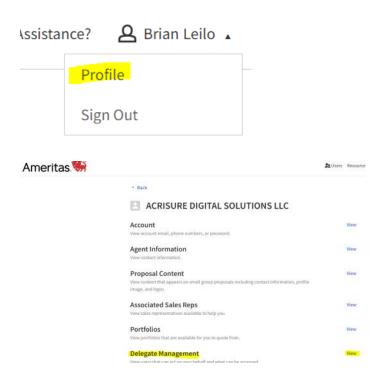
1.

Notes:

•

Ameritas

Monday, April 28, 2025 2:18 PM

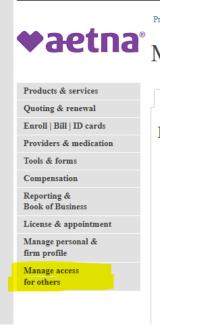


Aetna

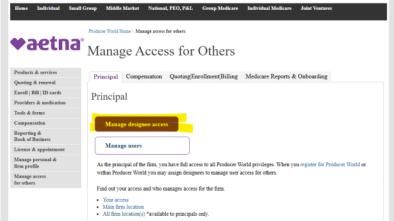
Wednesday, January 29, 2025 11:06 AM

Delegate Login Creation Instructions

- 1. Log into carrier portal.
- 2. Click Manage Access for Others on left hand side of screen.



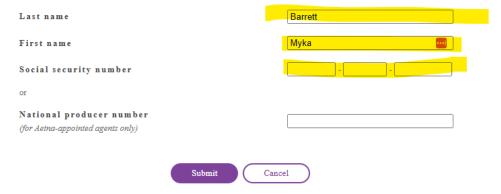
3. Click Manage Designee Access



4. Complete form. You will need to put in their SSN, so if the delegate isn't comfortable with this they will need to use the shared login and not have a delegate login.

Add Designee

To add a new firm designee, enter the user's first and last name below. For appointed users, enter the National Producer Number or Social Security Number. For non-appointed users, enter the Social Security Number.



5. Click Submit

Delegate Login Deactivation Instructions

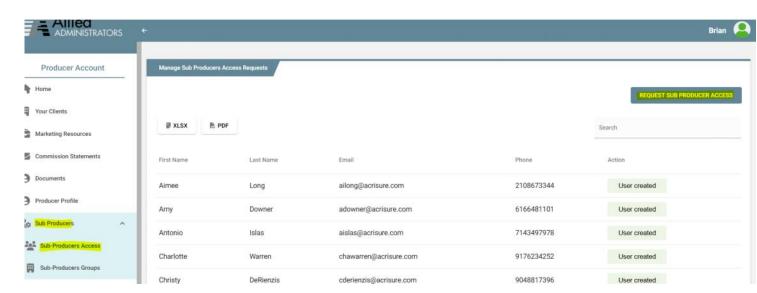
1.

Notes:

•

Allied Administrators

Monday, March 31, 2025 12:27 PM



To deactivate delegates, email brokers@alliedadministrators.com

Anthem

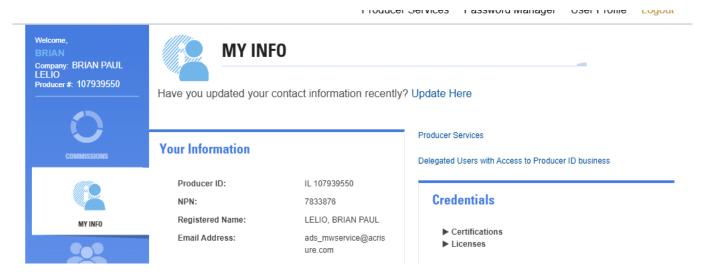
Thursday, May 8, 2025 1:06 PM

BCBS Illinois

Thursday, February 6, 2025 1:59 PM

Delegate Login Creation Instructions

1. Click on my info

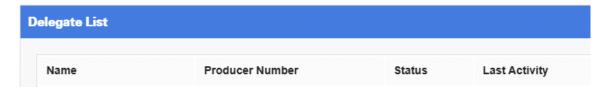


2. Go to "delegated users with access to producer ID business Home > Password Manager



PASSWORD MANAGER

New Delegate



3. Go to new delegate and fill out all the information for the delegate and choose the following access. Create username/password for delegate.

Delegate Login Deactivation Instructions

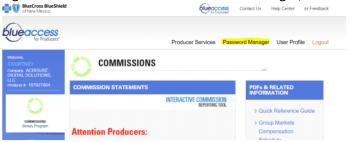
Acrisure Digital Solutions

BCBS New Mexico

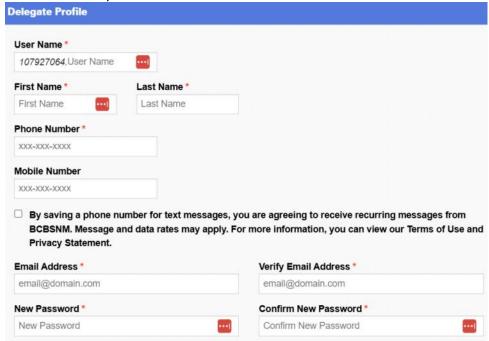
Thursday, January 16, 2025 12:02 PM

Delegate Login Creation Instructions

1. Sign in to account and click on Password Manager, then click new delegate



2. Fill out delegate profile using the information on team roster. Username can be first initial of name followed by AM's last name.



3. Select the highlighted boxes shown below



Delegate Login Deactivation Instructions

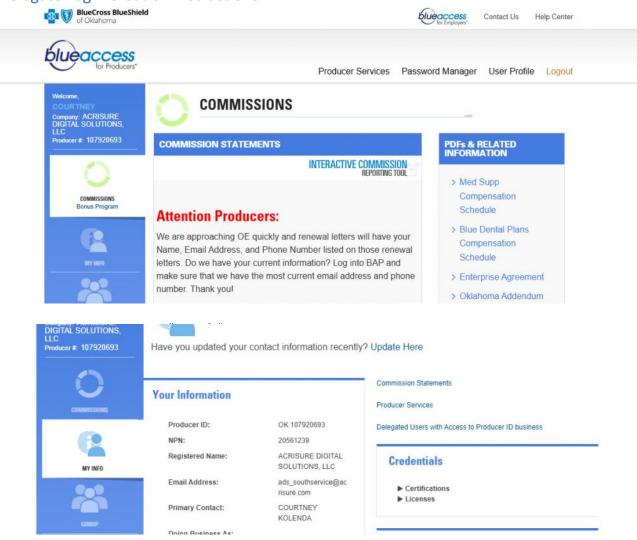
1.

Notes:

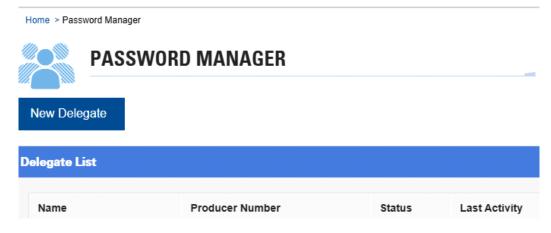
BCBS Oklahoma

Wednesday, January 29, 2025 4:27 PM

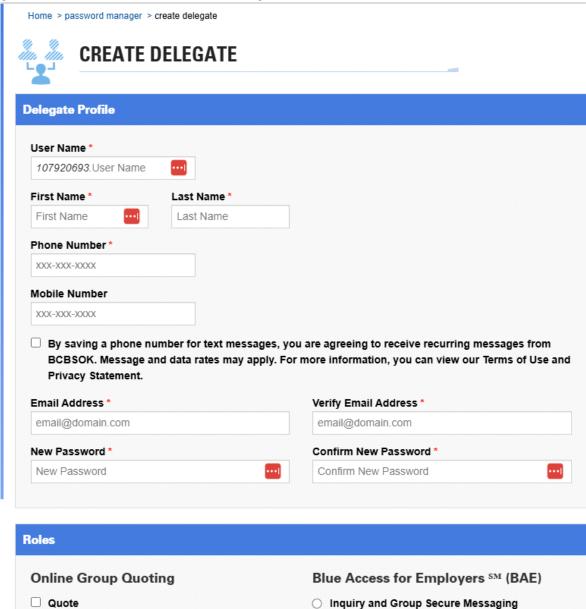




2. Navigate to the right panel Delegated Users with Access to Producer ID business



3. Click on new delegate



4. Fill in delegate information and use the second option maintenance and group secure messaging

☐ Small Group ACA Enrollment

O Maintenance and Group Secure Messaging

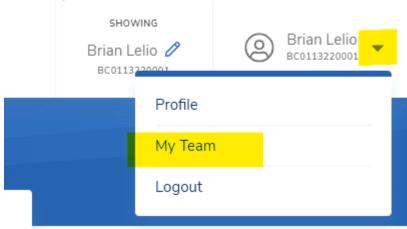
Group Secure Messaging

Blue Cross of Idaho

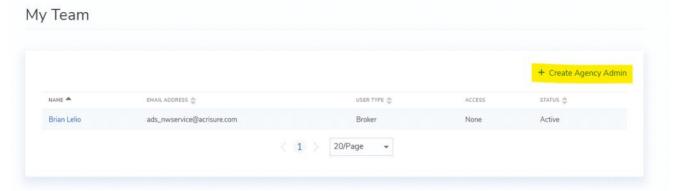
Wednesday, January 29, 2025 11:06 AM

Delegate Login Creation Instructions

- 1. Log in to portal.
- 2. In top right corner click the down arrow.
- 3. Select "My Team"

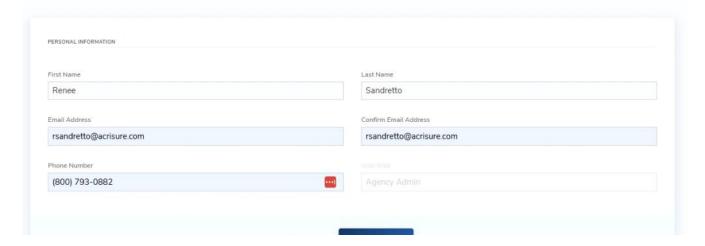


4. Click "+ Create Agency Admin"

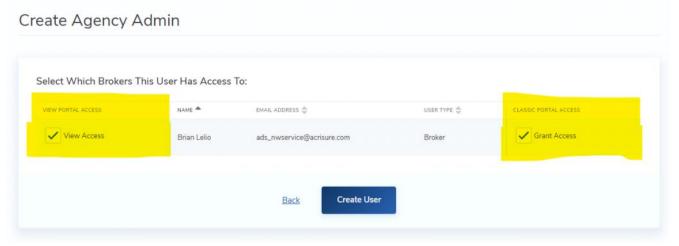


5. Complete the form (see below example)

Create Agency Admin

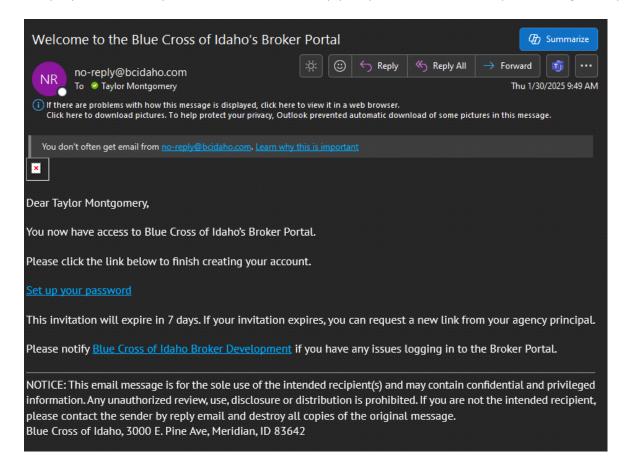


- 6. Click next.
- 7. Select the "View Portal Access" check box and the "Classic Portal Access" checkbox.



8. Click Create User.

An email will be sent to them from no-reply@bcidaho.com (see example below) instructing them to setup a password. They need to click on the "Set up your password" link to complete the login setup.



Delegate Login Deactivation Instructions

1.

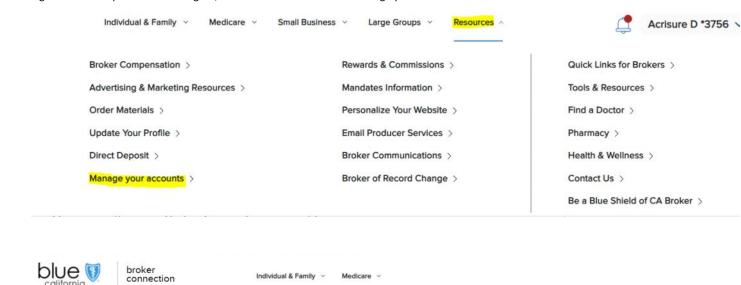
Notes:

• Security code goes to Taylor's cell phone

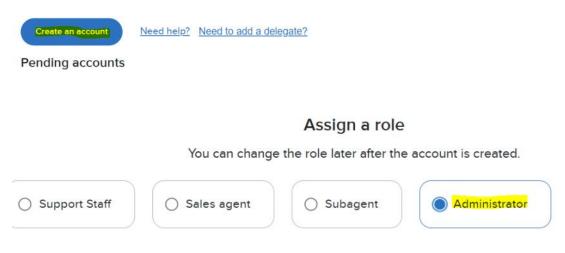
Thursday, February 13, 2025 11:21 AM

Delegate Login Creation Instructions

1. Sign in to broker portal and click agent, then select Resources then Manage your accounts



MANAGE BROKER CO



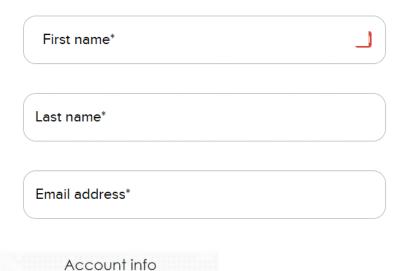
Then click continue

Choose lines of business

is is just for our information. It won't affect user access.



Enter personal details



Name: Sarah Duncan Role: Administrator
Email: sduncan@acrisure.com

We emailed Sarah Duncan a link to activate their account. They need the last 4 digits of the agency's tax ID for activation.

The link expires in 7 days.

Create another account

Delegate Login Deactivation Instructions

1.

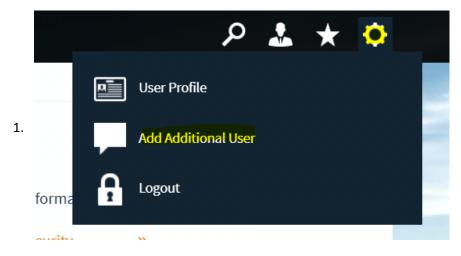
Notes:

•

Colonial Life

Friday, January 10, 2025 11:59 AM

Delegate Login Creation Instructions





Delegate Login Deactivation Instructions

1.

Notes:

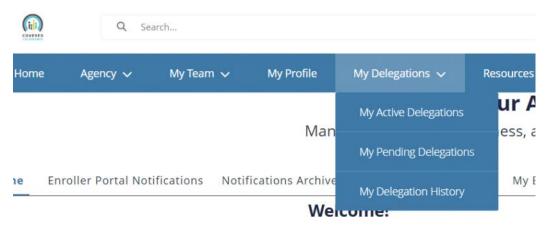
• MFA attached to Taylors number #

Covered CA

Friday, January 31, 2025 12:29 PM

Delegate Login Creation Instructions

1. Sign in to the carrier portal.



Delegate Login Deactivation Instructions

1.

Notes:

- Access Roles:
 - Agency Manger Level 2 (AM2) Individuals who are licensed and in good standing by the California Department of Insurance (CDI).
 - Functions the AM2 can perform:
 - ☐ Executes the Agency's Monetary Agreement
 - □ Performs other duties related to the Monetary agreement as needed.
 - Designated representative to whom all communications may be addressed and who
 has the authority to act on matters to the Monetary Agreement.
 - AM2 will be the primary contact for issues pertaining to the Monetary Agreement.
 - Agency Manager Level 1 (AM1) Individuals who are licensed and in good standing by the California Department of Insurance (CDI).
 - The following applies to AM1s:
 - □ Cannot complete a Book of Business (BoB) Transfer form requests for transfer out of the Agency
 - □ Cannot request changes to the Monetary Agency Agreement
 - ☐ Cannot request to add additional Agency Managers
 - Can request to add additional Agent Level 2, Agent level 1 Admin Approved Staff
 2, Admin Approved Staff 1
 - Authorized Signer Can execute the Monetary agreement for the Agency in place of the AM1. An individual cannot be both an AM1 and Authorized Signer. Do not need to be an individual with an active license with CDI.
 - Agent Level 2 Individuals who are licensed and in good standing by the California
 Department of Insurance (CDI). Can see and serve all consumers in the entire Agency
 delegation to any agent within the Agency.
 - Cannot transfer delegations

- Agent Level 2s can view and update records of consumers who are delegation to any Agent associated with that Agency
- Agent Level 1 Can only view and update records of consumers who are delegated to that agent.
- Admin Approved Staff Level 1 MUST not be a Certified Agent with Covered California.
 Process various tasks on behalf of the Agent.
- Admin Approved Staff Level 2 MUST not be a Certified Agent with Covered California.
 Process various tasks on behalf of the Agent with several other task that the Admin Approved Staff Level 1 is unable to perform.
- For commissions related to CCSB you can reach out to ccsbfinance@covered.ca.gov for assistance

Acrisure Digital Solutions Delta Dental of Illinois

Wednesday, January 29, 2025 12:50 PM

Delegate Login Creation Instructions

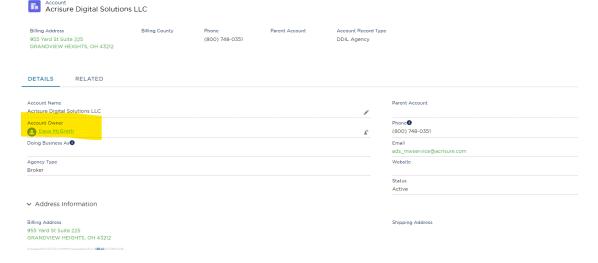
1.

Delegate Login Deactivation Instructions

1.

Notes:

• Here is a screenshot from the Account Information page. Dave McGrath is our assigned internal Sales Executive at Delta Dental of Illinois. He is listed as the "Account Owner" in the portal for internal purposes only, so that they know which sales executive is assigned to the agency. It doesn't impact commissions.



Delta Dental of Kansas

Monday, February 10, 2025 8:26 AM

Delegate Login Creation Instructions

1.

Delegate Login Deactivation Instructions

1.

Notes:

• In order to see and service client data in carrier portal client must complete and sign the attached form and Login Administrator emails it to marketing@deltadentalks.com



DDKS_Brok er Client ...

Delta Dental of Missouri

Friday, February 7, 2025 9:26 AM

Delegate Login Creation Instructions

1.

Delegate Login Deactivation Instructions

1.

Notes:

• Carrier requires each group to sign the Request For Broker/Consultant Access to Employer Portal form to give our agency access to their information in the carrier portal. Send completed form to GAService@deltadentalmo.com.



Broker_Onli ne_Acces...

Guardian

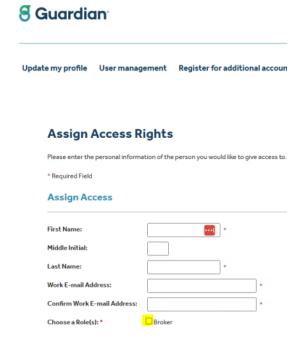
Thursday, January 23, 2025 12:09 PM

Delegate Login Creation Instructions

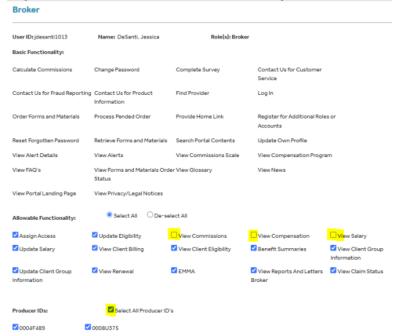
1. Sign in to portal, then click assign access under User Management



2. Fill out the AM's information from team roster. Select Broker as shown below, then select continue at the bottom right of the page



3. Select all but unselect the highlighted shown below.



Delegate Login Deactivation Instructions

1.

Notes:

Hartford

Wednesday, January 29, 2025 11:06 AM

Delegate Login Creation Instructions

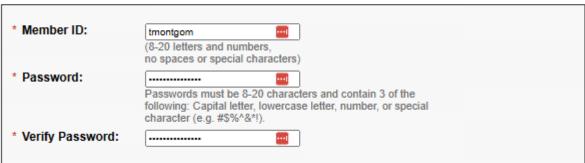
1. Click Member Mgmt in top right corner of screen.



- 2. Click Create New Member
- 3. Enter member id (suggest first initial last name example: tmontgom)
- 4. Enter Password & verify password.

Step 1

Provide information about the new member.

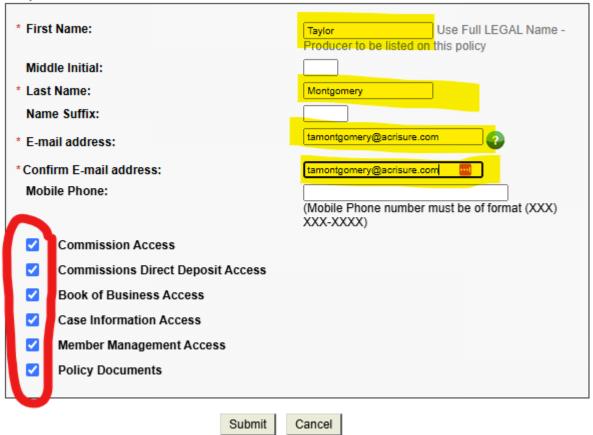


5. Choose User Role - Assistant

Choose this Users role

- O Producer -You are a producer appointed with The Hartford
- Assistant- You are assisting an appointed producer with The Hartford
- 6. Click Create Member
- 7. Complete the Step 2 form (see below)

Step 2



- 6. Click Submit
- 7. Send email to person you just set up and give them their User Name & Password

URL	https://producerview.thehartford.com
User Name	
Password	

Delegate Login Deactivation Instructions

- 1. Click Member Mgmt in top right corner of screen.
- 2. Select person you want to term/delete in the Member Name drop-down.
- 3. Click Delete

Notes:

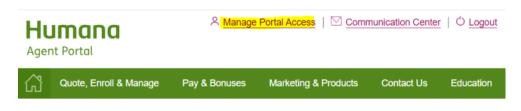
•

Humana

Thursday, January 23, 2025 4:11 PM

Delegate Login Creation Instructions

1. Sign in to broker portal and click agent, then select Manage Portal Access



2. Then click Manage Users



Dashboard



3. Follow the image below



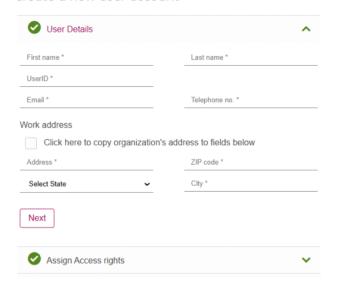
Manage Users

Create new user accounts, update existing acc



4. Fill out the AM's information from the team roster, then click create

Create a new user account





Delegate Login Deactivation Instructions

1.

Notes:



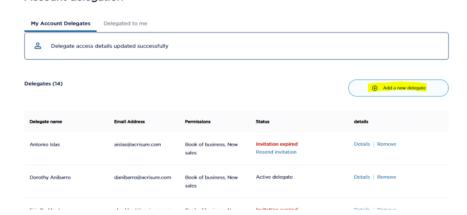
Thursday, January 23, 2025 4:11 PM

Delegate Login Creation Instructions

1. Sign in to broker portal, and select account delegation in the dropdown under Brian's name as shown below



2. Select add new delegate Account delegation



3. Fill out the AM's information from the team roster, then select the boxes shown below. Then select add delegate

Delegate information

First name	Last name						
<u></u>							
Email Address							
Confirm Email Address							
Access permissions for this delegate							
This delegate may view and make changes	to:						
Commission Statements							
Book of business and contract renewals							
Allow this delegate to access my book of b	usiness for the following groups						
Small business groups							
No access to any small business g	roups						
Access to all small business group	s						
Access to a custom list of small business groups.							
New Sales (New customer setup, Prospe	ective quoting)						
Delegation Agreement							
	ct on your behalf within the permissions you t delegates, you assume responsibility for any t.						
agree and assume responsibility for this delegate's actions within my account.							
	Cancel Add delegate						

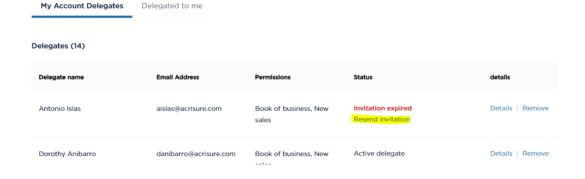
To Resend Invite

1. Sign in to broker portal, and select account delegation in the dropdown under Brian's name as shown

→ Sign off



Click the resend option Account delegation



Delegate Login Deactivation Instructions

1. Sign in to broker portal, and select account delegation in the dropdown under Brian's name as shown below



2. Click on remove

Account delegation

My Account Delegates	Delegated to me

Delegates (14)

Delegate name	Email Address	Permissions	Status	details
Antonio Islas	aislas@acrisure.com	Book of business, New sales	Invitation expired Resend invitation	Details Remove
Dorothy Anibarro	danibarro@acrisure.com	Book of business, New	Active delegate	Details Remove

Notes:

Lincoln Financial

Thursday, January 16, 2025 12:02 PM

Delegate Login Creation Instructions

- 1. After logging in choose Lelio53570 as the Broker Account.
- 2. Click Continue.
- 3. Click profile and settings at the top of the screen.
- 4. Click Update your settings.
- 5. Click Access & Permissions
- 6. Click Provide Access.
- 7. Complete form for each delegate.

Sending Delegate email from Onboarding inbox

1. Lincoln Financial - "Brian's Email" must be the ADS_WestService inbox. Please add that to your communications when advising a team member to expect an email from the carrier with a delegation code.



Delegate Login Deactivation Instructions

1. To deactivate delegates, email clientservices@LFG.com

Notes:

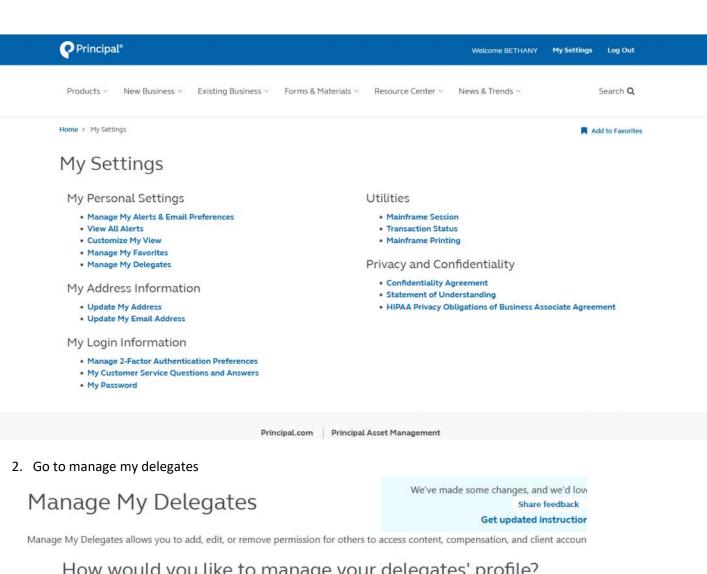
• MFA attached to Taylors number #

Principal

Thursday, February 6, 2025 12:00 PM

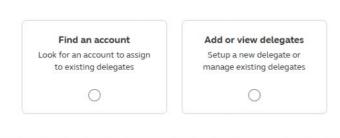
Delegate Login Creation Instructions

1. On the homepage go to settings

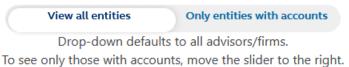


How would you like to manage your delegates' profile?

Choose to either search for a particular account or add/view delegates



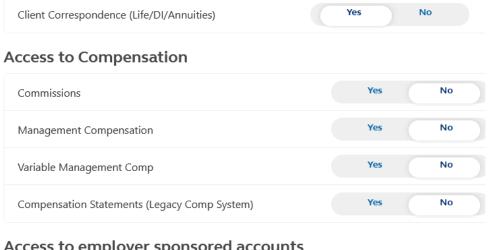
3. Go to add or view delegates.



View delegates for..



- 4. On this drop down choose the second option for ADS
- 5. Click on add delegate
- 6. Fill in name and email, phone number
- 7. Choose these below options for delegate access and confirm access then add delegate Access to applications



Access to employer sponsored accounts



Vision Service Plan (VSP)

Wednesday, January 29, 2025 11:00 AM

Notes:

- Even though they allow delegate logins they were only able to connect all clients to 5 delegates.
- Decided to go with one shared login and a backup account that has access to all clients.
 - User ID: acri.di = main shared account
 - **User ID**: Tayl.mo9 = back-up account
- To get access to a group added email vspcentral@vsp.com request to add group and cc' Brian and ask him to send approval

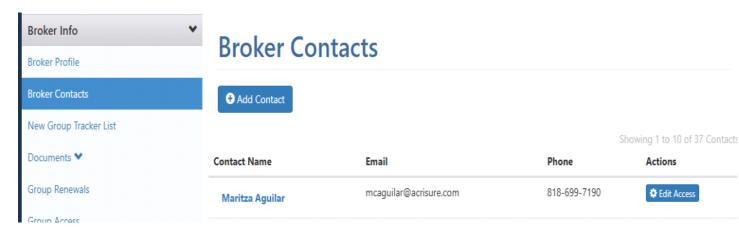
Morgan White Group

Wednesday, January 29, 2025 2:19 PM

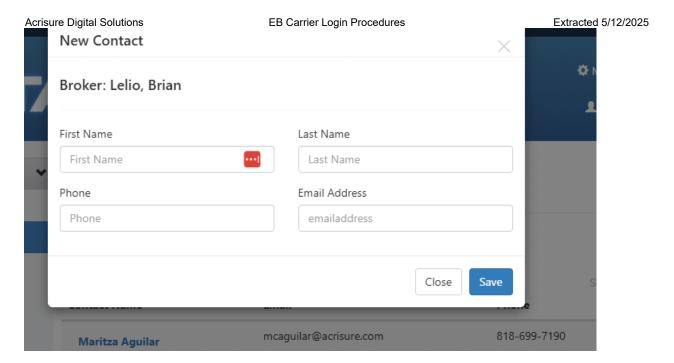
Delegate Login Creation Instructions



1. Login and Choose the second tab on the left "Broker Contacts



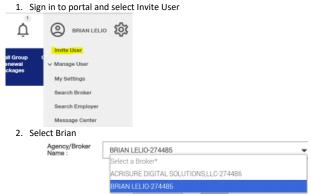
2. Select Add Contact



3. Fill out this basic info and after this screen it will take you to choose what type of access. Choose "Broker Administrator with Production

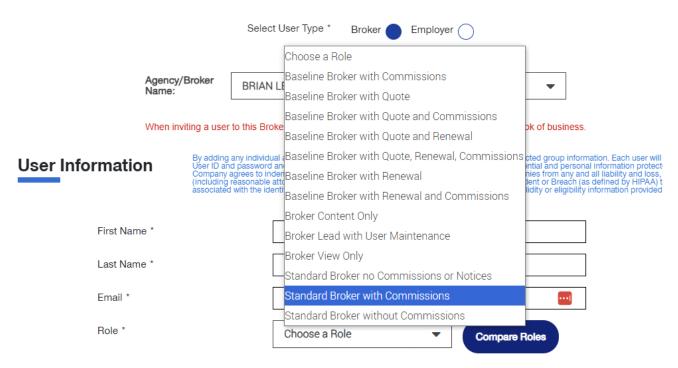
Friday, January 31, 2025 12:00 PM

Delegate Login Creation Instructions



3. Fill out AM's information using the team roster

Invite User



4. Select Delegate as Broker User Type

Broker User Type

User Type identifies the Principals/Owners associated to this Broker/Agency. By selecting the Broker User Type of Administrator, you are assigning this user as the Principals/Owner.



5. Click Create



Delegate Login Deactivation Instructions

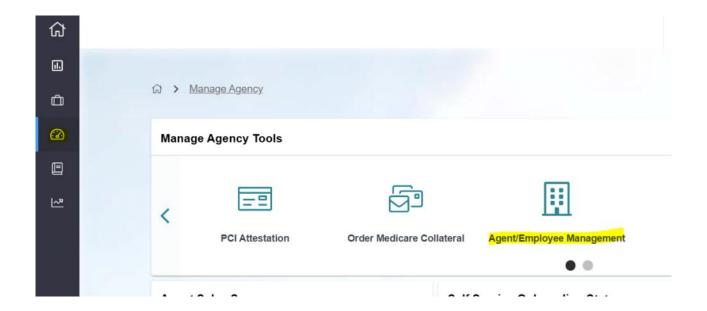
1.

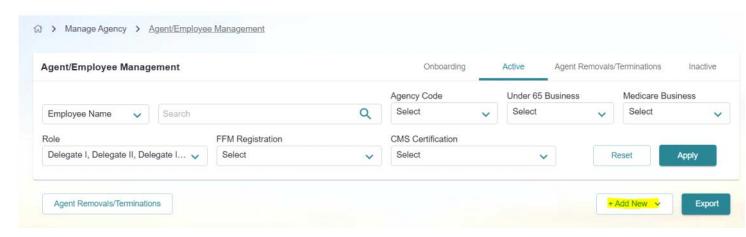
Notes:

Florida Blue

Thursday, March 27, 2025 3:44 PM

Phone number = Noelle's phone

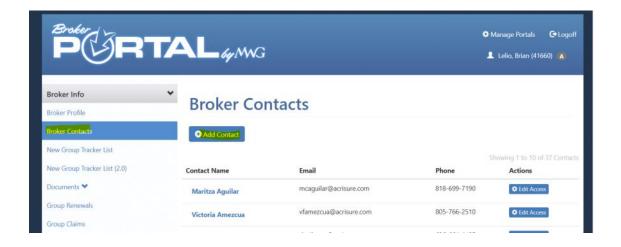




Morgan White Group MWG

Monday, March 31, 2025 12:32 PM

To deactivate delegates, email brokerservices@morganwhite.com





Wednesday, April 9, 2025 2:37 PM

Delegate Login Creation Instructions

How can I request credentials for a new user?

Brokers and Producers can register for an account at <u>accessable.usablelife.com</u> and select the Create an Account header.

For additional user accounts for your group, log in to AccessAble and choose User Account Management. USAble Life will follow up with the requestor if additional information is needed.

Employees may also register using the custom employee access link provided by the group administrator.

Delegate Login Deactivation Instructions

How do I disable or update a user account?

Group administrators can utilize the User Account Management section to disable an account or contact Customer Care at 800-370-5856 or customervalue usablelife.com to update their billing, claims, or enrollment related privileges.

Employees who have an online account will automatically lose access when a group administrator processes their termination.

Notes:

Consoliplex/the Cube

Monday, April 28, 2025 1:55 PM



My Groups Quote Helper Renewals Manage Logins Logout

Manage Logins



Username	Email	Brokerage	Actions
ADSAdmin	eepopoola@acrisure.com		Delete
mcorlew1	mcorlew@acrisure.com		Delete
Pmarsh	pmarsh@acrisure.com		Delete

Company Info

Friday, October 4, 2024 11:43 AM

Acrisure Digital Solutions, LLC

Tax ID/FEIN: 92-1273756

Address: 955 YARD ST #225 GRANDVIEW HEIGHTS, OH 43212

Phone: 380-254-8032 **NPN**: 20561239

Brian's Information

Birthdate: 09/22/1971

NPN: #7833876

Courtney Kolenda's Information

Birthdate: 02/24 **CA License** #: 0H70292

Acrisure Advantage Services

Tax ID: 87-3094758 NPN: 20122338

LastPass Access Outside of ADS Departments

Tuesday, February 11, 2025 2:46 PM

Reg. Affairs Has Access to ADS LastPass

- Leeah
- Ezekiel
- Megan

Accounting Has Access to ADS LastPass

- Josh Smart
- Sarah Duncan