


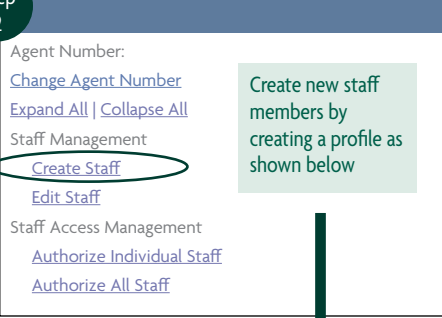
## Set up new access

**Step 1** Under the "My Business" tab...



Access Entitlement  
Pending Business  
Producer Profile  
Commission Information  
Inforce Contract Information

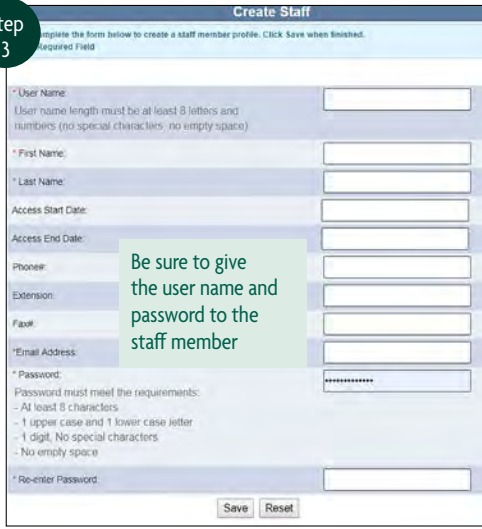
**Step 2**



Agent Number:  
[Change Agent Number](#)  
[Expand All](#) | [Collapse All](#)  
Staff Management  
**Create Staff**  
[Edit Staff](#)  
Staff Access Management  
[Authorize Individual Staff](#)  
[Authorize All Staff](#)

Create new staff members by creating a profile as shown below

**Step 3**



**Create Staff**

Complete the form below to create a staff member profile. **CLICK Save** when finished.  
Required Field

\* User Name: [ ]  
User name length must be at least 8 letters and numbers (no special characters, no empty space)

\* First Name: [ ]

\* Last Name: [ ]

Access Start Date: [ ]

Access End Date: [ ]

Phone: [ ]

Extension: [ ]

Facsimile: [ ]

\* Email Address: [ ]

\* Password: [ ]  
Password must meet the requirements:  
- At least 8 characters  
- 1 upper case and 1 lower case letter  
- 1 digit, No special characters  
- No empty space

\* Re-enter Password: [ ]


[Save](#) [Reset](#)

Be sure to give the user name and password to the staff member

After creating a staff user, you will need to authorize what they have access to on the site. You have two options; 1) authorize an individual user; or 2) authorize all staff. Use this option if you have created multiple new staff users and you want them all to have the same access.

## Authorize individual access

**Step 1**



**Business Tool Management**

[Expand All](#) | [Collapse All](#)  
Staff Management  
[Create Staff](#)  
[Edit Staff](#)  
Staff Access Management  
**Authorize Individual Staff**  
[Authorize All Staff](#)

Authorize access for one person

**Step 2**

**Authorize Individual Staff**

User Name	Name	Create Date
bsmith	Bob Smith	04/19/2018
fjames	Frank James	04/19/2018
badams	Bill Adams	05/08/2018
smason	Sue Mason	06/13/2018
cjones	Carol Jones	11/28/2018
tevans	Tom Evans	02/15/2019

**Step 3**

**Authorize Individual Staff**

Agent Number: [ ]  
User Name: tevans  
Name: Tom Evans  
Create Date: 02/15/2019  
System Access: 02/15/2019

**Business Tool**

- Annuity Application Packets
- Annuity Commission History
- Annuity Correspondence
- Annuity Document Upload
- Annuity Fixed Agent Commissions
- Annuity Fund Performance
- Annuity Inforce Contract Access
- Annuity MDRT Letter Request
- Annuity Notifications
- Annuity Office Staff Access Management
- Annuity Pending Business
- Annuity Producer Profile
- Annuity Supply Online
- Annuity UPS Shipping Labels

The default setting allows access to all tools. Simply uncheck the tools you don't want your staff to see and click on update

# Authorize all access

**Step 1**

Agent Number:  
[Change Agent Number](#)  
[Expand All](#) | [Collapse All](#)  
 Staff Management  
[Create Staff](#)  
[Edit Staff](#)  
 Staff Access Management  
[Authorize Individual Staff](#)  
[Authorize All Staff](#)

Authorize access for all staff at one time

**Step 2**

**Select Agent Number**

You have the ability to authorize your office personnel to access the same systems that you use. You can create profiles for your agency staff and then tailor the system access for each of these profiles. To begin, select an agent number from the list below.

Select agent Number

# Edit staff access

**Step 1**

**Business Tool Management**

Agent Number:  
[Change Agent Number](#)  
[Expand All](#) | [Collapse All](#)  
 Staff Management  
[Create Staff](#)  
[Edit Staff](#)  
 Staff Access Management  
[Authorize Individual Staff](#)  
[Authorize All Staff](#)

Edit, delete or reset password

**Step 2**

**Edit Staff**

User Name	Name	Create Date
bsmith	Bob Smith	04/19/2018
fjames	Frank James	04/19/2018
badams	Bill Adams	05/08/2018
smason	Sue Mason	06/13/2018
cjones	Carol Jones	11/28/2018
tevens	Tom Evans	02/15/2019

**Step 3**

**Edit Staff**

Complete the form below to create a staff member profile. Click save when finished.  
 \*Required Field

\*User Name

\*First Name

\*Last Name

Access Start Date

Access End Date

Phone #

Extension

Fax #

\*Email Address

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