

Set up new access

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

Commission Information

- > Commission Statements
- > Commission Schedule(s)

Inforce Contract Information

- > Inforce Contract Access
- > Inforce Correspondence

Office Staff Access Management

- > Office Staff Access Management

Reporting Tools

Step 2

Expand All | Collapse All

Staff Management

- Create Staff
- Edit Staff

Staff Access Management

- Authorize Individual 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:

Fax#:

* 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:

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
<u>tevens</u>	Tom Evans	02/15/2019

Step 3

Authorize Individual Staff

Agent Number: _____

User Name: tevens

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

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 all staff at one time

Step 2

Authorize All Staff

This menu allows you to set authorization access for all your staff and will override individual staff authorizations have processed.

Application Name	Access
Access Entitlement	Inherit my access
Access Entitlement for Annuity	Inherit my access
Annuity 403b Plan Sponsors	Inherit my access
Annuity Annualized Commissions	Inherit my access Grant access(override) Deny access(override)

If you'd like your staff to have the same access as you, use the "inherit my access" tool which will override individual access

Edit staff 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

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	tevens
*First Name	Tom
*Last Name	Evans
Access Start Date	
Access End Date	
Phone #	
Extension	
Fax #	
*Email Address	tevens@company.com

Update Reset

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