Adding Secondary user for Security Access – Agent Portal

Register New User for Security Access

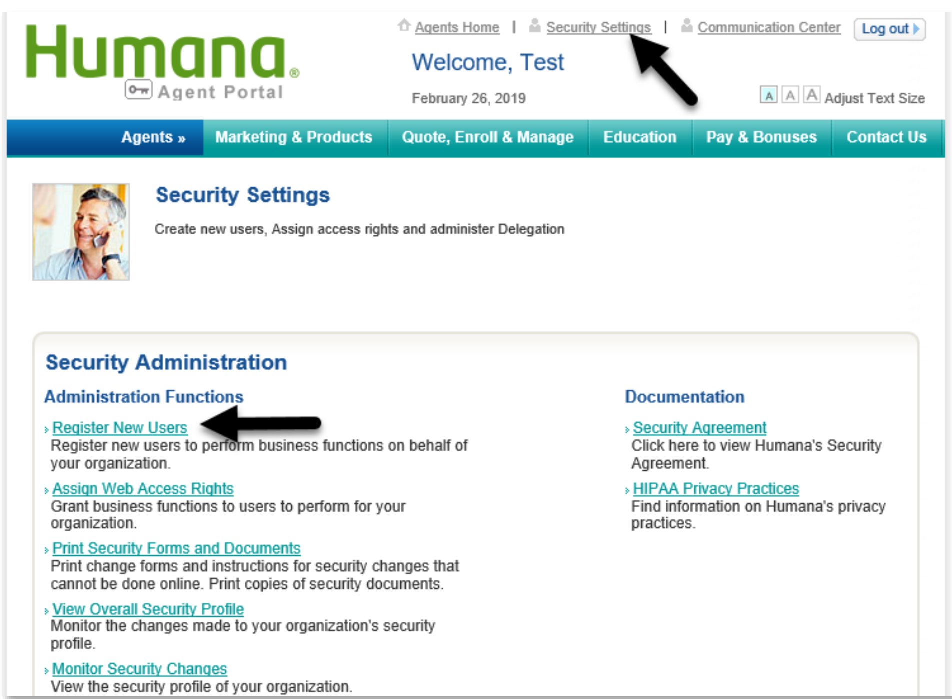
Manage Delegated Organizations

Below is the process on adding secondary users in the Agent Portal. If you have additional questions about this process please give the Humana web team a call at 888-666-5733 option 4 for agents.

Register New User for Security Access

Log in to the Agent portal and locate the **Security Settings** link at the top of the page. Once on the **Security Settings** page click on the first blue link on the left, **Register New Users**.

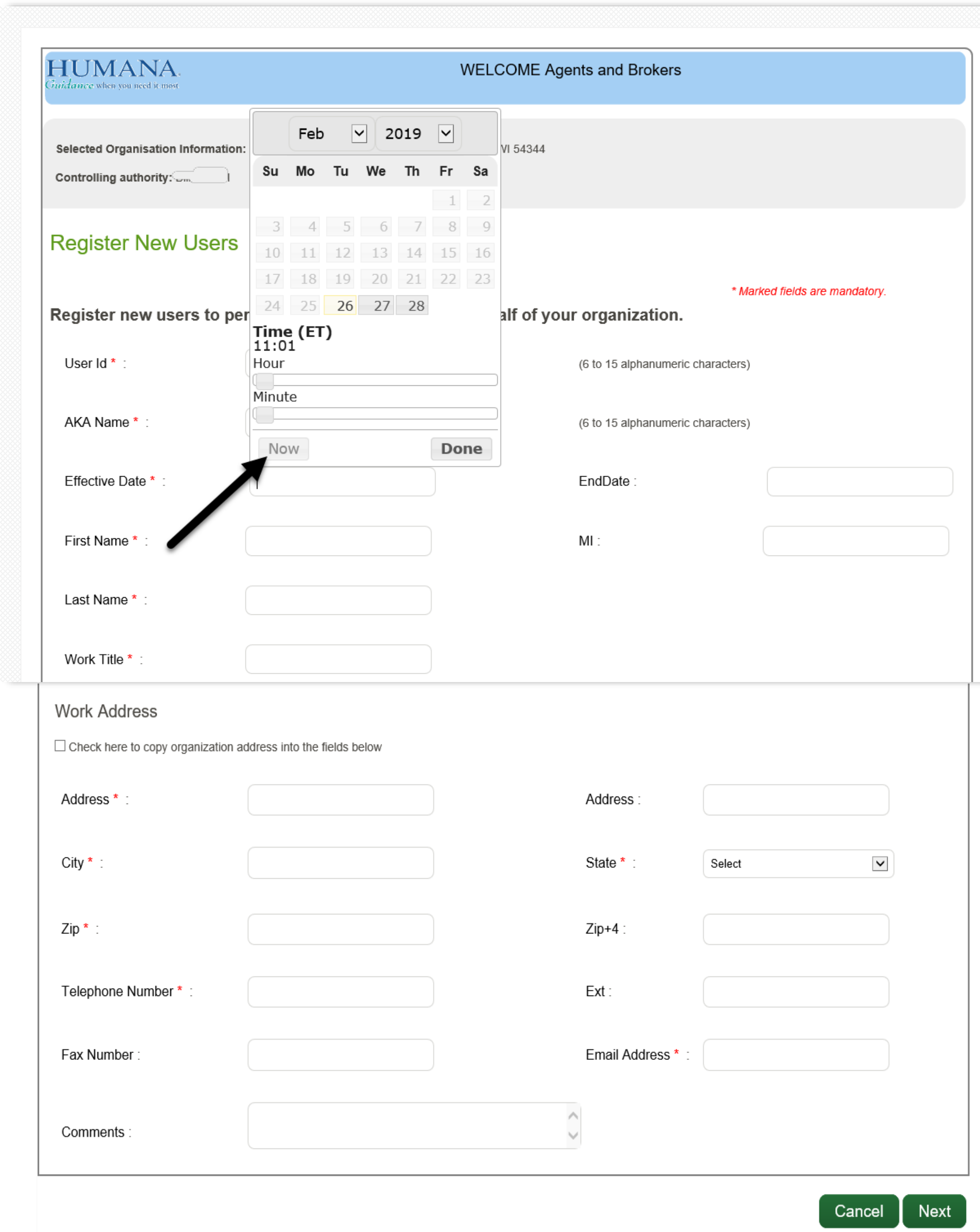
NOTE: Any user of the Humana self-service portals is required to have their own logon. Sharing secure logons is a violation of the web services agreement and may result in web access being revoked.



The PAA will create a **User ID** and **AKA Name** for the Secondary User. The AKA Name is a secondary identification for security purposes, and should differ from the username.

The **Effective Date** should be checked as 'now' and the user will have access right away. If the date is selected from the calendar the user may have to wait 24 hours to view their account. The **End date** can be left blank.

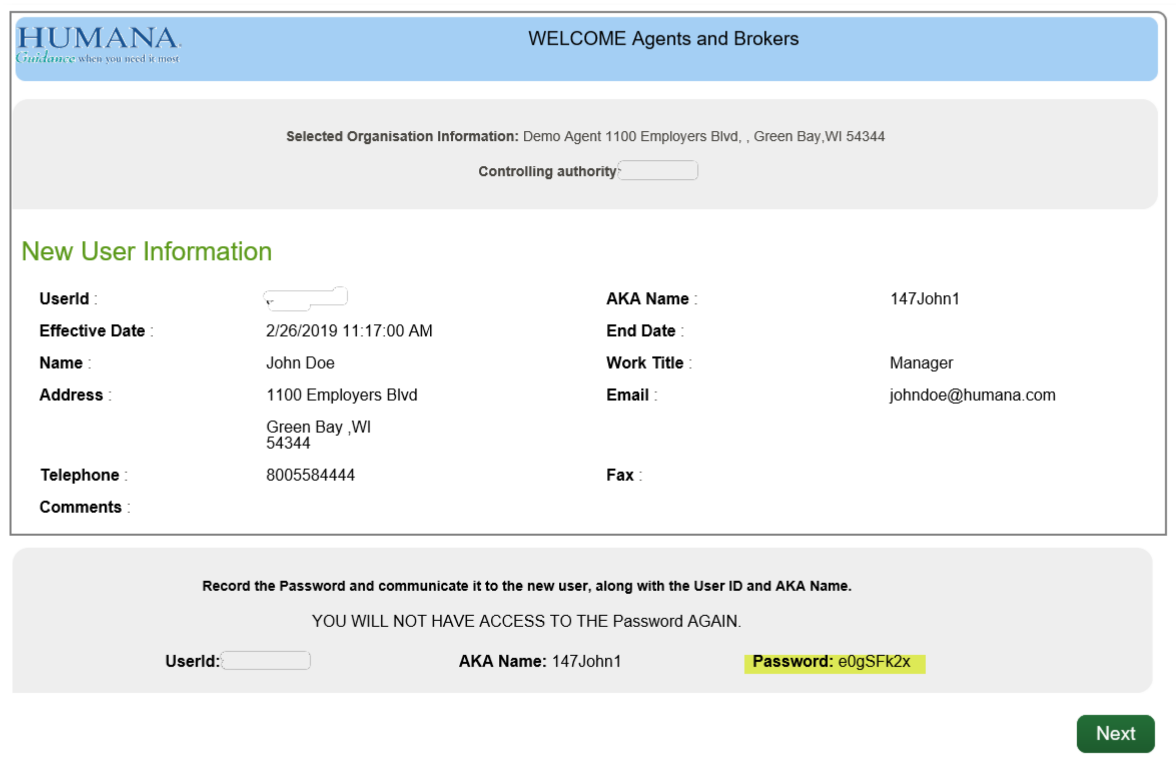
Once all the fields have been entered click **Next**.



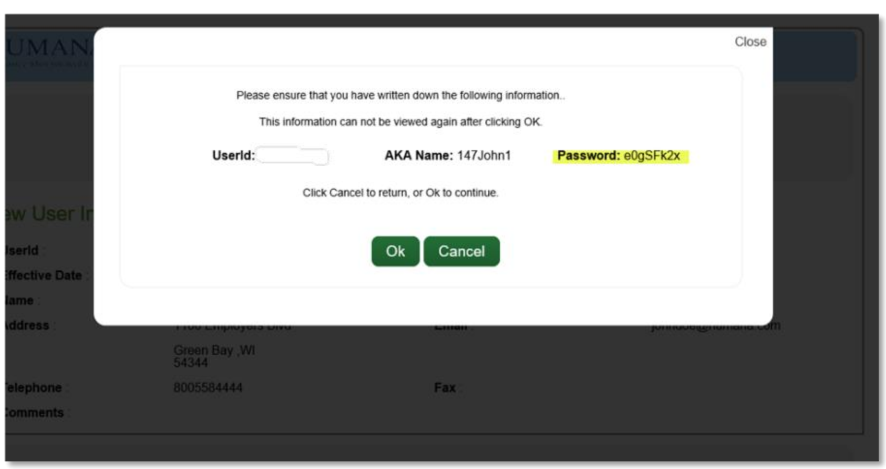
Once the profile is saved successfully, the confirmation page will appear.

A **temporary password** is provided, *this is the only time the temporary password is viewable*. It is recommended to print or screenshot the confirmation page to provide to the user.

Once the User ID and password are recorded, click **Next**.

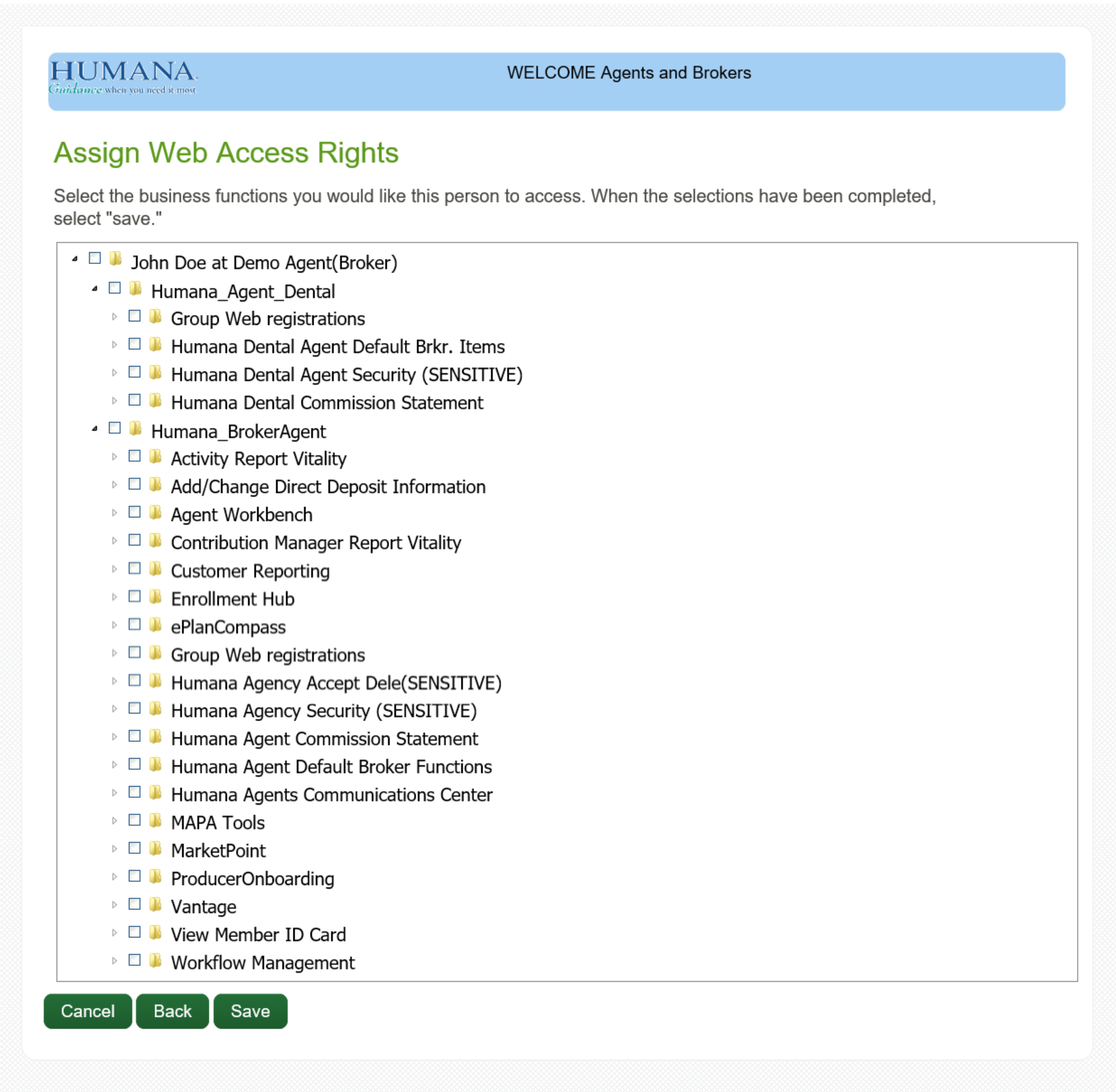


After clicking **Next** a pop up will appear to confirm you have captured the **User ID** and **temporary password** for the secondary user. Click **OK** to continue.

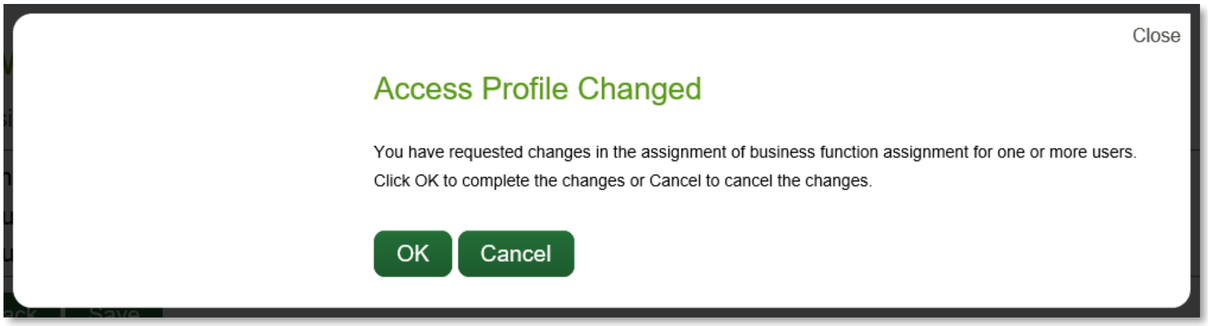


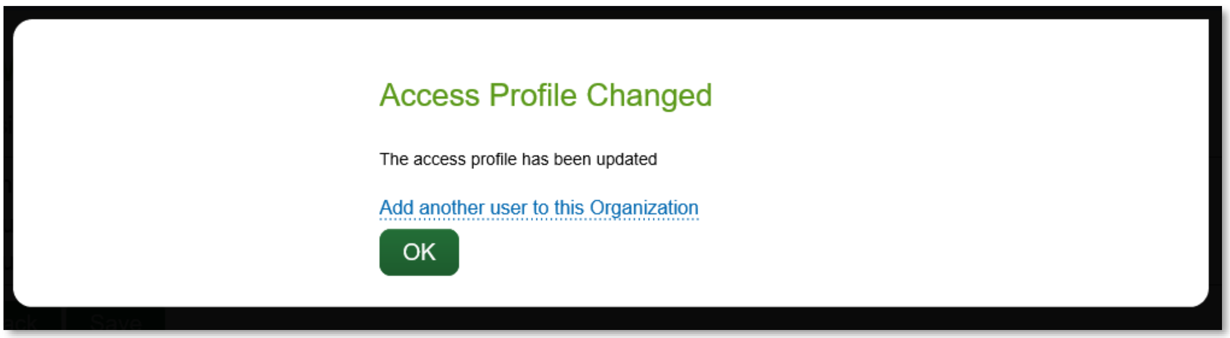
Once the profile is created, the PAA will assign **Business Functions**, or tools, to the user. Open each folder to assign functions. Each function can be expanded further to customize access. Access rights can be managed at any time.

Check everything you would like the user to have access to within the agent portal, this page will not affect access to employer groups.



When assignment is complete click **Save**, a confirmation message will appear





Managing Delegated Organizations

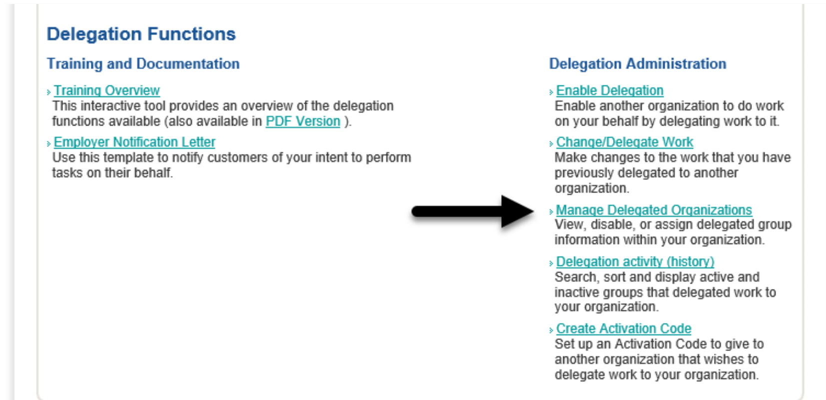
Agent Auto-Delegation of Commercial Groups:
Delegation flows to the Humana Agent Number, or SAN, of the AOR/WA listed for the group. The PAA that has registered the SAN will receive auto delegation for all groups sold under that SAN.

Commercial agents are able to act on behalf of their employer groups for many administrative functions. Delegation is available to both the Agent of Record (AOR) and Writing Agent (WA) for medical and dental groups with a case size of 2-3000.

NOTE: Stand alone groups do not delegate to the agent portal (vison, life or Go365 (NIM) only groups) but those products will delegate if they are paired with medical or dental. For stand alone groups, the employer has access via the employer portal and can add an agent as an authorized user

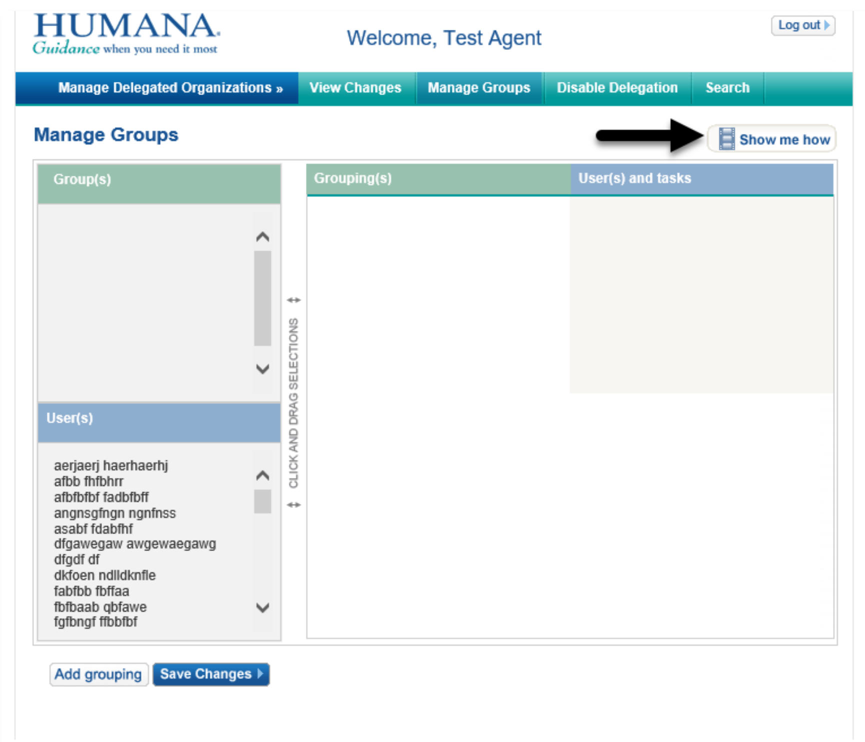
The **Delegation Functions** are located in the **Security Settings** section of the **Security Administration screen** at the bottom of the page.

To assign groups to a secondary user, select **Manage Delegated Organizations.**



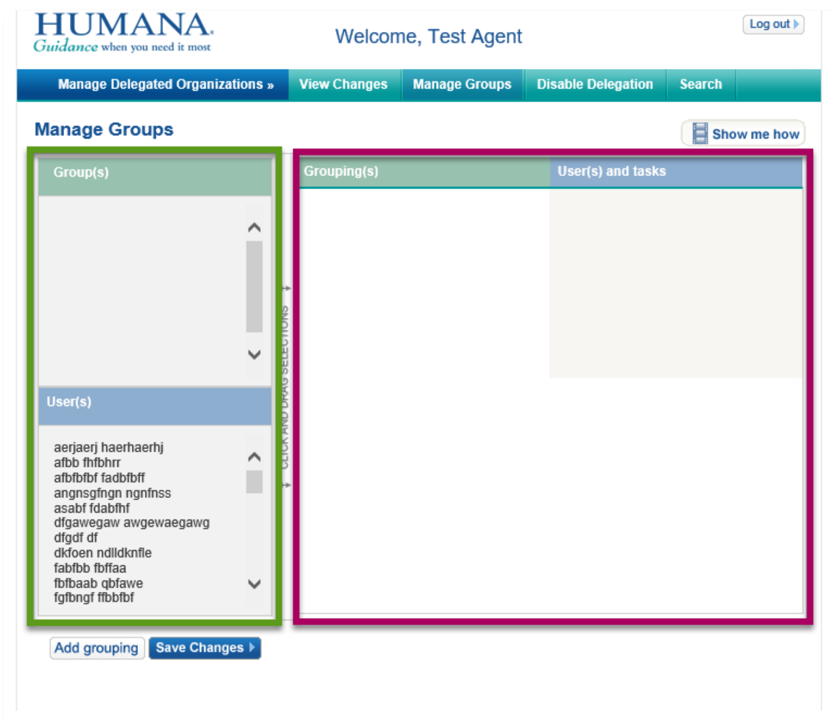
On the **Manage Groups** page you will be able to drag and drop the groups you would like the user to have access to.

It is recommended that you review the "Show Me How" tutorial video the first time you delegate groups to users.



The **left** side of the screen shows group and user listings.
The **right** side of the screen shows group and user relationships.

You can drag and drop multiple groups and users by holding down the Control key while clicking on the groups or users.



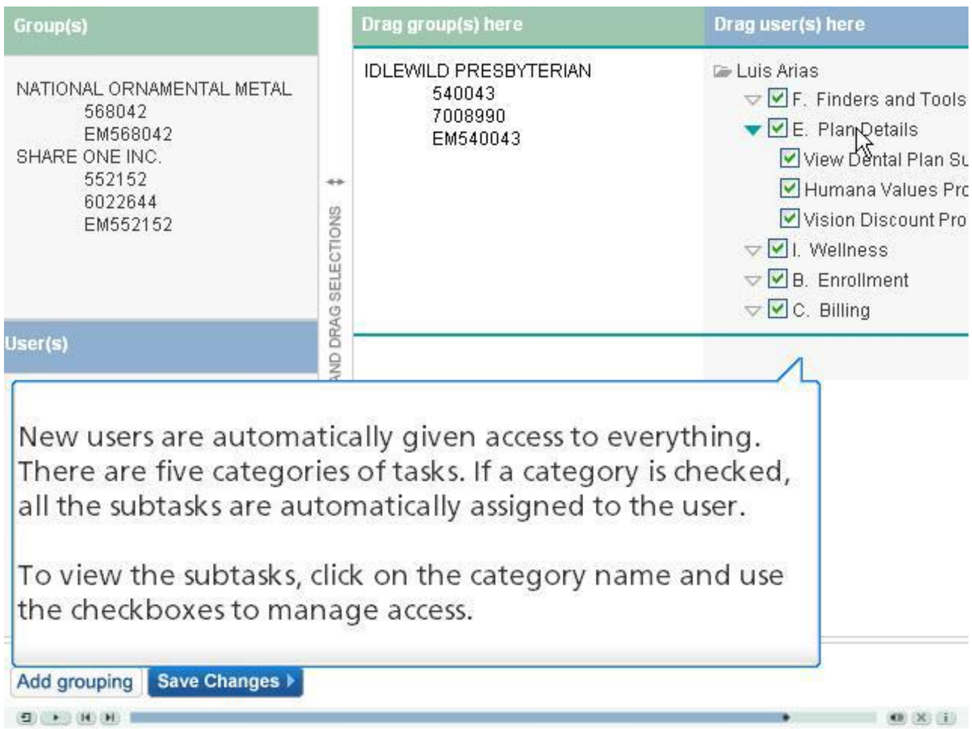
You can assign:

- One user to one group
- Multiple users to one group
- Multiple groups to one or more users at a time

NOTE: When adding additional groups or users, drop them on top of groups/users already showing in the column.

You can customize the employer functions each user has access to in the user(s) column. The default is for all users to have access to all employer functions available to agents.

Note: While the employer functions that agents have access to are the same ones that employers use, it is a limited set of functions and looks different from the functions the employer can access via the **Employer Self-Service Portal**.



Once complete, click **'Save Changes'** in the botton left of the **Manage Delegated Oraganizations** page.