

Adding Secondary user for Security Access – Agent Portal

Register New User for Security Access

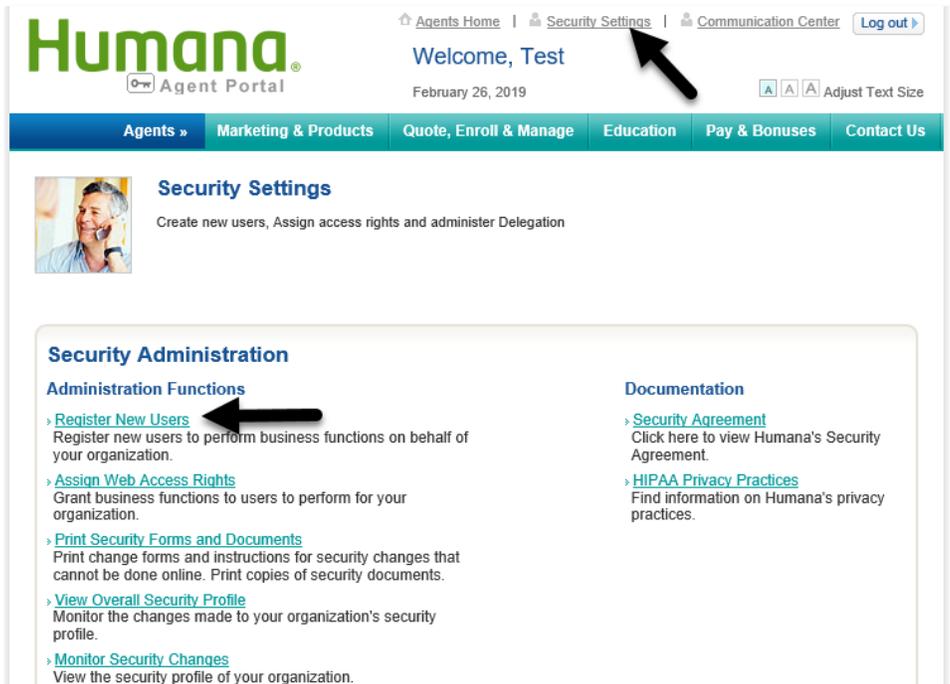
Manage Delegated Organizations

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 screenshot displays the Humana Agent Portal interface. At the top left is the Humana logo and "Agent Portal" text. The top right navigation bar includes "Agents Home", "Security Settings" (with a black arrow pointing to it), "Communication Center", and "Log out". Below this is a blue navigation bar with links: "Agents", "Marketing & Products", "Quote, Enroll & Manage", "Education", "Pay & Bonuses", and "Contact Us". The main content area is titled "Security Settings" and includes a sub-header "Create new users, Assign access rights and administer Delegation". Below this is a "Security Administration" section with two columns of links. The "Administration Functions" column contains: "Register New Users" (with a black arrow pointing to it), "Assign Web Access Rights", "Print Security Forms and Documents", "View Overall Security Profile", and "Monitor Security Changes". The "Documentation" column contains: "Security Agreement" and "HIPAA Privacy Practices".

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**.

The screenshot shows the Humana 'Register New Users' form. At the top, the Humana logo and 'WELCOME Agents and Brokers' are visible. The form is divided into two main sections: 'Register New Users' and 'Work Address'.

Register New Users Section:

- Selected Organisation Information:** VI 54344
- Controlling authority:** [Text input field]
- Register New Users to per** [Text input field]
- User Id * :** [Text input field] (6 to 15 alphanumeric characters)
- AKA Name * :** [Text input field] (6 to 15 alphanumeric characters)
- Effective Date * :** [Calendar pop-up] [Text input field]
- First Name * :** [Text input field]
- Last Name * :** [Text input field]
- Work Title * :** [Text input field]
- Half of your organization.** [Text input field]
- EndDate :** [Text input field]
- MI :** [Text input field]

Work Address Section:

- Check here to copy organization address into the fields below
- Address * :** [Text input field]
- City * :** [Text input field]
- Zip * :** [Text input field]
- Telephone Number * :** [Text input field]
- Fax Number :** [Text input field]
- Comments :** [Text area]
- Address :** [Text input field]
- State * :** [Dropdown menu]
- Zip+4 :** [Text input field]
- Ext :** [Text input field]
- Email Address * :** [Text input field]

Calendar Pop-up:

- Month: Feb, Year: 2019
- Days of the week: Su, Mo, Tu, We, Th, Fr, Sa
- Current date: 26
- Time (ET): 11:01
- Hour: [Text input field]
- Minute: [Text input field]
- Buttons: Now, Done

Buttons: Cancel, 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**.

The screenshot shows a web interface for Humana. At the top left is the Humana logo with the tagline "Guidance when you need it most". The header says "WELCOME Agents and Brokers". Below this, it displays "Selected Organisation Information: Demo Agent 1100 Employers Blvd, , Green Bay,WI 54344" and a "Controlling authority:" field. The main section is titled "New User Information" and contains a table of user details:

Userid :	<input type="text"/>	AKA Name :	147John1
Effective Date :	2/26/2019 11:17:00 AM	End Date :	
Name :	John Doe	Work Title :	Manager
Address :	1100 Employers Blvd Green Bay ,WI 54344	Email :	john DOE@humana.com
Telephone :	8005584444	Fax :	
Comments :			

Below the table, a grey box contains the instruction: "Record the Password and communicate it to the new user, along with the User ID and AKA Name." followed by "YOU WILL NOT HAVE ACCESS TO THE Password AGAIN." Below this, the user details are repeated: "Userid: AKA Name: 147John1 Password: e0gSFk2x". A green "Next" button is located at the bottom right of the page.

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.

The screenshot shows a modal dialog box with a white background and a dark border. It contains the following text: "Please ensure that you have written down the following information." followed by "This information can not be viewed again after clicking OK." Below this, the user details are displayed: "Userid: AKA Name: 147John1 Password: e0gSFk2x". At the bottom, there is a prompt: "Click Cancel to return, or Ok to continue." and two buttons: "Ok" and "Cancel". The dialog box is overlaid on a blurred background of the previous page.

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.

Assign Web Access Rights

Select the business functions you would like this person to access. When the selections have been completed, select "save."

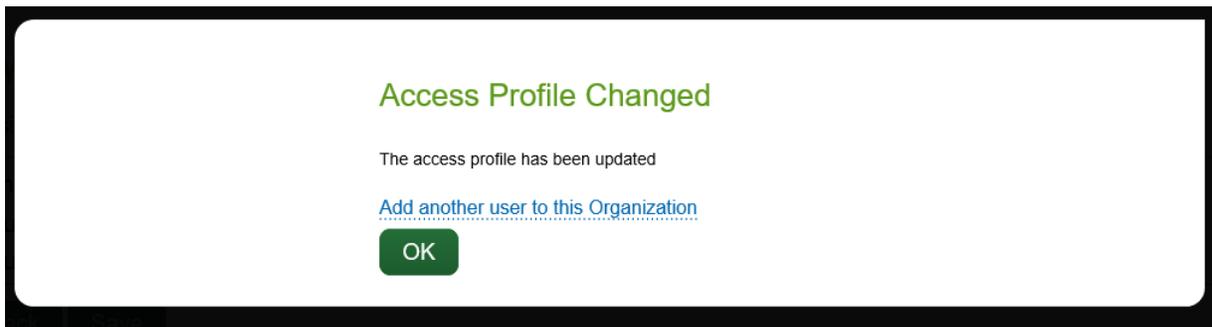
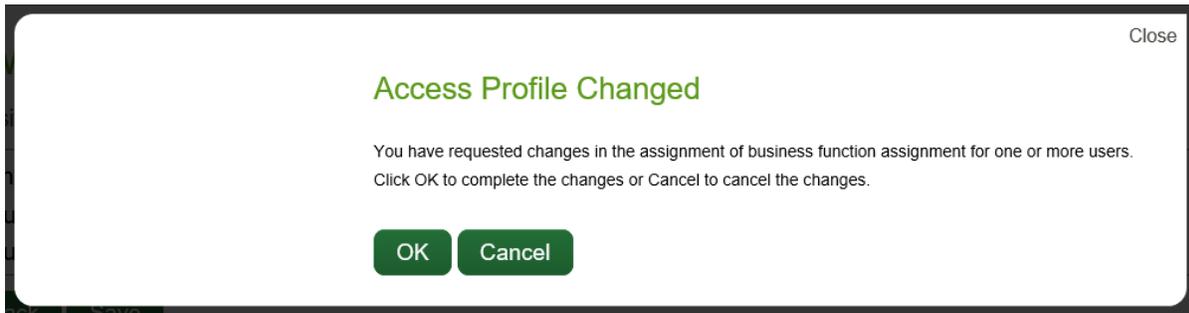
-  John Doe at Demo Agent(Broker)
 -  Humana_Agent_Dental
 - ▶  Group Web registrations
 - ▶  Humana Dental Agent Default Brkr. Items
 - ▶  Humana Dental Agent Security (SENSITIVE)
 - ▶  Humana Dental Commission Statement
 -  Humana_BrokerAgent
 - ▶  Activity Report Vitality
 - ▶  Add/Change Direct Deposit Information
 - ▶  Agent Workbench
 - ▶  Contribution Manager Report Vitality
 - ▶  Customer Reporting
 - ▶  Enrollment Hub
 - ▶  ePlanCompass
 - ▶  Group Web registrations
 - ▶  Humana Agency Accept Dele(SENSITIVE)
 - ▶  Humana Agency Security (SENSITIVE)
 - ▶  Humana Agent Commission Statement
 - ▶  Humana Agent Default Broker Functions
 - ▶  Humana Agents Communications Center
 - ▶  MAPA Tools
 - ▶  MarketPoint
 - ▶  ProducerOnboarding
 - ▶  Vantage
 - ▶  View Member ID Card
 - ▶  Workflow Management

Cancel

Back

Save

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



Managing Delegated Organizations

Agent Auto-Delegation of Commercial Groups:

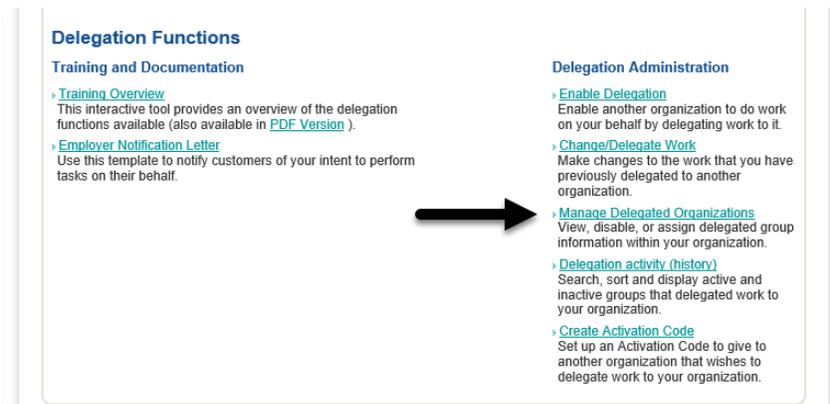
Delegation flows to the Humana Agent Number, or SAN, of the AOR/WA listed for the group. The PAA that has registered the SAN will receive auto delegation for all groups sold under that SAN.

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 (vision, 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

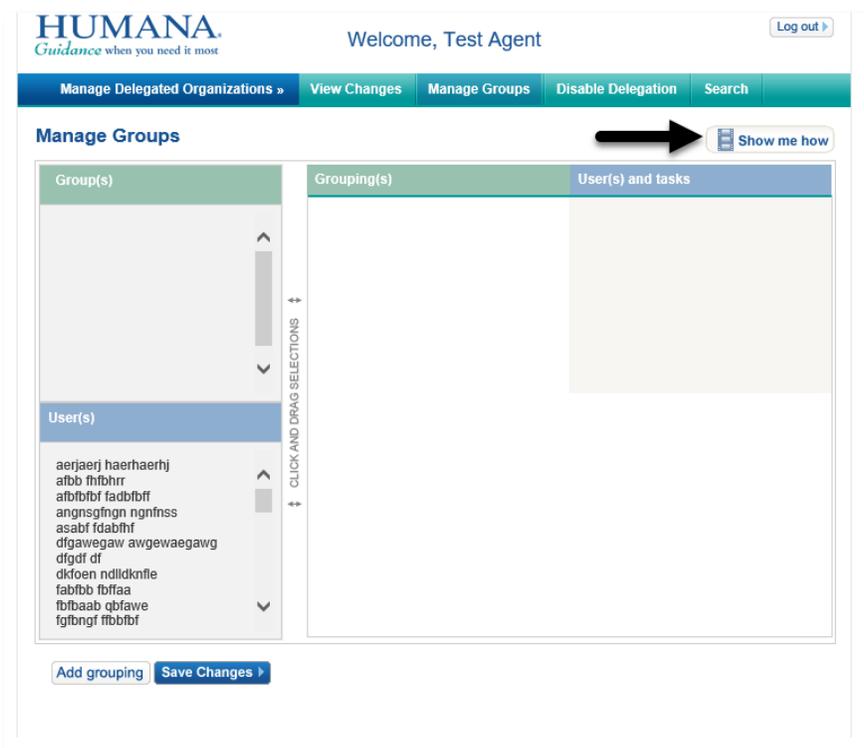
The **Delegation Functions** are located in the **Security Settings** section of the **Security Administration** screen at the bottom of the page.

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



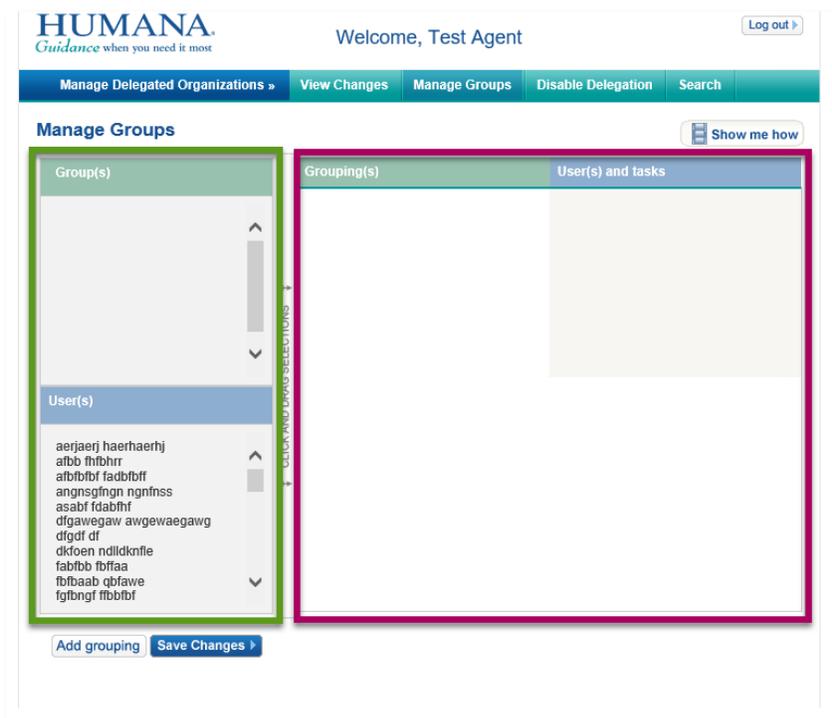
On the **Manage Groups** page you will be able to drag and drop the groups you would like the user to have access to.

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**.

The screenshot displays a web interface for managing delegated organizations. It is divided into three main columns: 'Group(s)', 'Drag group(s) here', and 'Drag user(s) here'. The 'Group(s)' column lists two organizations: 'NATIONAL ORNAMENTAL METAL' with IDs 568042 and EM568042, and 'SHARE ONE INC.' with IDs 552152, 6022644, and EM552152. The 'Drag group(s) here' column shows 'IDLEWILD PRESBYTERIAN' with IDs 540043, 7008990, and EM540043. The 'Drag user(s) here' column shows a user named 'Luis Arias' with a list of tasks: 'F. Finders and Tools', 'E. Plan Details' (expanded to show 'View Dental Plan St.', 'Humana Values Prc', and 'Vision Discount Pro'), 'I. Wellness', 'B. Enrollment', and 'C. Billing'. Each task has a checkbox, and 'E. Plan Details' is currently expanded. A vertical label 'AND DRAG SELECTIONS' is positioned between the first two columns. At the bottom, there are buttons for 'Add grouping' and 'Save Changes'. A callout box with a blue border and a pointer to the 'E. Plan Details' category contains the following text:

New users are automatically given access to everything. There are five categories of tasks. If a category is checked, all the subtasks are automatically assigned to the user.

To view the subtasks, click on the category name and use the checkboxes to manage access.

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