

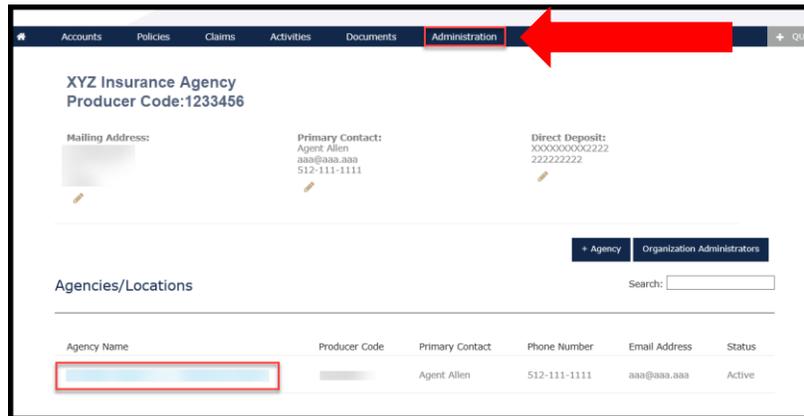
Adding Users in Agent Gateway

This job aid demonstrates the process of adding users in Agent Gateway.

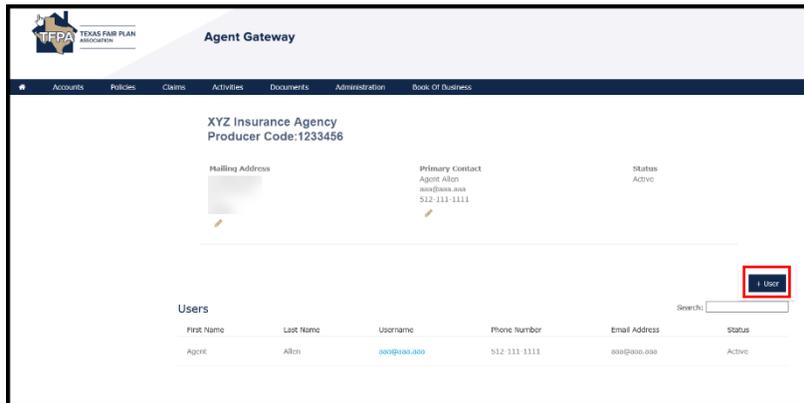
To add a User in Agent Gateway, you must be an Agency Administrator.

You will click on the Administration tab, and then select the Agency that is receiving the additional user.

If you are the Administrator of one Agency, that agency will automatically appear on your screen.



Then, click the “+User” button.



Enter the email address of the user you would like to add. Then, click the magnifying glass to search for the user. If the user is not found in the system, you will get a message that says, “No user with matching email address found”, and you may proceed with adding the user.

Agency Contact

Email Address * agent@agency.com

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If a user was found, you can review their role and edit the user as needed.

The screen will then expand to allow for entering information for the user and role assignments.

Each authorized agency is assigned an Agency Administrator, which is the Primary Contact. You may assign additional 'Agency Administrator' roles. However, most users of the system will be assigned the role of 'Agency User'.

Once you complete the fields on the screen, click Submit.

The screenshot shows a web form for creating a new user. At the top, a blue banner displays the message "No user with matching email address found". Below this, there is a search bar for "Email Address" containing the text "tfpa@tfpa.com". A "New User" button is highlighted with a red box. The form includes fields for "First Name", "Last Name", "Email Address" (pre-filled with "tfpa@tfpa.com"), and "Phone Number". A "Roles" section is highlighted with a red box and contains a table with two roles: "Agency Admin" and "Agency User". Each role has a checkbox in the first column. At the bottom right, "Cancel" and "Submit" buttons are highlighted with a red box.

Name	Description
<input type="checkbox"/> Agency Admin	Permission to view agency details and manage users, update address etc.
<input type="checkbox"/> Agency User	Permission to perform policy transactions like New Submission, Renewal, Policy Change, Policy Change etc.

Then, the user will:

1. Receive an email from TFPA stating they have been added as a user.
2. The user will click on the link in the email to activate themselves in Agent Gateway.
3. Once the link is clicked, the user will enter a few pieces of information.
4. Once that information is entered and validated, they will establish their password.

Now, the user is activated in Agent Gateway and can begin submitting business to TFPA.

Please contact Agent Services at 1-800-979-6443 or agentservices@twia.org for assistance.

