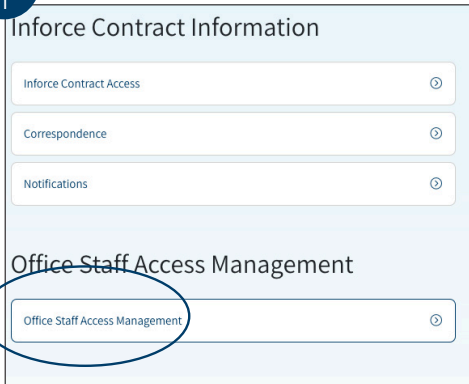


Set up new access

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



Inforce Contract Information

- Inforce Contract Access
- Correspondence
- Notifications

Office Staff Access Management

- Office Staff Access Management

Step 2

Business Tool Management

Staff Management

- Create Staff
- View Staff

Create new staff members by creating a profile.

Step 3

Create Staff User

User Name: *

First Name: *

Last Name: *

Access Start Date:

Access End Date:

Phone Number#:

Extension:

Fax#:

Email Address: *

Password: *

Confirm 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

Staff Access Management

- Authorize Individual Staff
- Authorize All Staff

Authorize access for one person

Step 2

Authorize Individual Staff

User Name	Name	Created Date
PhilSmith	Phil Smith	06/09/2020
JGrayson	Janet Grayson	05/08/2020
SJacobs	Steven Jacobs	12/04/2012
MAnderson	Mike Anderson	12/04/2012

Step 3

Authorize Individual Staff

User Name: SJacobs

Name: Steven

Created Date: 12/04/2012

Application Name	Access
Agent Authorization For Entitlement	NO
Annuity Application Packets	YES
Annuity Commission History	YES
Annuity Correspondence	YES

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

Authorize all access

Step 1

Business Tool Management

Staff Management

- Create Staff
- View Staff

Staff Access Management

- Authorize Individual Staff
- Authorize All Staff**

Authorize access for all staff at one time

Step 2

Authorize All Staff

Application Name	Access
Agent Authorization For Entitlement	Inherit my access
Annuity Application Packets	Inherit my access
Annuity Commission History	Inherit my access
Annuity Correspondence	Inherit my access

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

Staff Management

- Create Staff
- View Staff**

Staff Access Management

- Authorize Individual Staff
- Authorize All Staff

Here you can edit staff, reset password information. You can also delete user (not shown).

Step 2 Edit staff or reset password information.

View Staff User List

User Name	Name	Created Date	Action
PhilSmith	Phil Smith	06/09/2020	
JGrayson	Janet Grayson	05/08/2020	

View Staff User List

User Name	Name	Created Date	Action
PhilSmith	Phil Smith	06/09/2020	
JGrayson	Janet Grayson	05/08/2020	

Step 3 Edit staff user information

Update Staff User

User Name: JGrayson

First Name: Janet Grayson

Last Name: Janet Grayson

Access Start Date: Access Start Date

Access End Date: Access End Date

Phone Number: Phone Number

Extension: Extension

Fax: Fax

Email Address: JGrayson@email.com

Save Reset

Reset password information

Reset Staff User Password

Do you want to reset password for this staff user?

Yes No

Create Staff User

User Name: JGrayson

Password: Password

Confirm Password: Confirm Password

Save Reset

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