

Hastings Mutual Insurance Company

User Account Management Set up and Reference Guide

What the Program Will Do

The purpose of the Agency Authentication program is to give our agents the ability to create multiple users with unique login information and individual permission levels for access to online information. Agencies will be able to determine appropriate permission levels for individual users which will determine access to everything from online production reports to who can order co-op materials online.

This functionality also allows more accurate data collection of individuals in each agency so that we can better target our communications to ensure that the right information gets to the right people. Agency Authentication will also allow for the collection of licensing information keeping us up to date on every producer in each office.

This is a completely optional program; if you do not wish to participate you may continue to use the single sign on process with universal access to all aspects of our website for every person.

Agency Authentication – Getting Started

1. Each agency should select an individual who will serve as the agency administrator to opt in to Agency Authentication and to set up individual user accounts. Please note that the Agency Administrator role will have no restrictions to the information that can be accessed via the website. They will also have the ability to create new users, change user permissions to both the website and agency codes, and delete users when necessary.
2. To begin Agency Authentication the selected agency administrator should log in to the HMIC website using their agency's original account (similar to 000XXXX) and click on the Account Management tab.











3. Partner agencies in place prior to Agency Authentication will be directed to a detailed explanation of the User Account Management program. Please read through every screen and click "Next" until you reach the screen where you are able to "opt in" to the program. You will need to confirm that you have read the information and would like to participate in the program.
4. Once an agency has selected an Agency Administrator(s), create a new Agency Administrator account by clicking on Add a New User. Again, please note the Agency Administrator role will have no restrictions to the information they can access on the website.

User Account Management

User Account Management gives our agents the ability to create individual user ID's and manage website permissions within your agency. For full details on the program and how to get started, please click the [Administrative Manual Link](#).
Permissions Explanations

Administrative Manual

User Name	Role		
gilligan5044	User Account	 Edit	 Delete
jdoe@test.com	Agency Administrator	 Edit	 Delete
john_smith	Agency Administrator	 Edit	 Delete
king*kong	User Account	 Edit	 Delete

[+ Add a New User](#)

5. Agency Administrator's basic information is entered on the Add a New User screen.

Add a new user

Agency Personnel

Name	<input type="text" value=""/> <input type="text" value="middle name"/> <input type="text" value="last name"/>	Please enter first and last name
Nick Name	<input type="text" value="nick name"/>	
Date of Birth	<input type="text"/>	Please Provide your DOB
Email Address	<input type="text"/>	Please enter a valid email address
Confirm Email Address	<input type="text"/> <input type="checkbox"/> Use email as username	Please confirm the email address
Username	<input type="text"/>	Please enter at least 8 characters This is not case-sensitive
Password	<input type="text"/> e.g. Password1	8-32 characters A minimum of (1) upper-case letter
Confirm Password	<input type="text"/> The new user will change this when they log in.	A minimum of (1) lower-case letter A minimum of (1) number
Account Type		Please choose an account type
Primary Agency	<input type="text" value="-- choose primary agency --"/>	Please choose a primary agency
Roles (required)	<input type="checkbox"/> Accounting <input type="checkbox"/> Claims <input type="checkbox"/> CSR <input type="checkbox"/> IT <input type="checkbox"/> OfficeAdmn <input type="checkbox"/> Principal <input type="checkbox"/> Producer <input type="checkbox"/> Solicitor	Please choose a Role









[+ Create](#) [Cancel](#)


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 Add a New User

- Each new user and Agency Administrator(s) will require input of a name, an email address, a username and a password. Confirmation of the email address and password will be required. Please note that an email can be used for the username as well.

Username requirements:

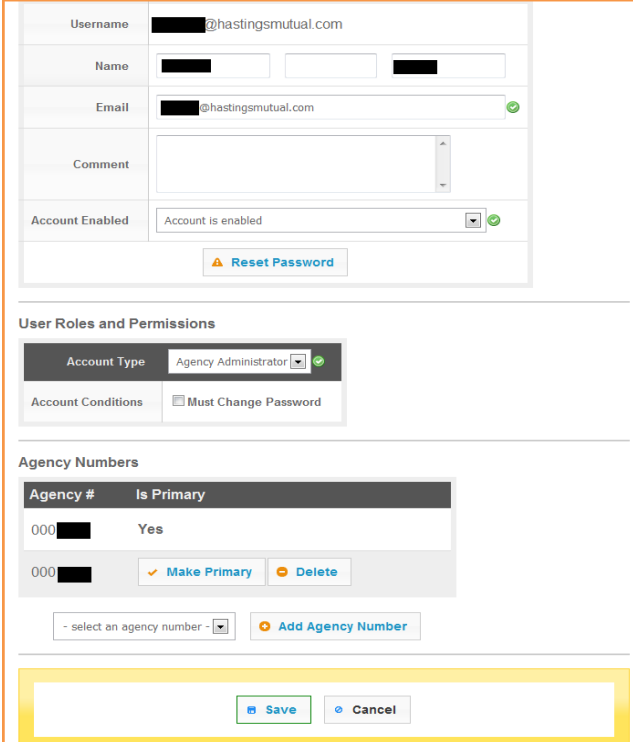
- Must be alpha-numeric
- Cannot use the following symbols: ampersand (&), quotes ("), or apostrophe (')

Password requirements:

- 8-32 characters
- 1 UPPERCASE letter
- 1 lowercase letter
- 1 number

- Each user will be required to change the password established by the Agency Administrator. It will be acceptable to select a temporary password such as Password1 as it will be required to change upon initial user log in.
- The primary agency number will determine the default address as well as the default agency for production reports and Policy Express.
- Click 'Create'

- The User Details screen will display. In the Agency Numbers section, each associated agency will be assigned to the Agency Administrator that is being established.



The screenshot shows a form for creating a user account. It includes fields for Username, Name, Email, Comment, and Account Enabled. Below these are sections for User Roles and Permissions, and Agency Numbers. The Agency Numbers section has a table with columns for Agency # and Is Primary, and buttons for Make Primary and Delete. At the bottom are Save and Cancel buttons.

Agency #	Is Primary
000 [redacted]	Yes
000 [redacted]	

7. Remember to make note of the new user name and password created for the Agency Administrator as this user name and password will be required to sign in to the website.
8. On the next screen, scroll to the middle of the page after reviewing any listed agency numbers and click on “Save”.
9. Once a new Agency Administrator has been created, the 000XXXX account is disabled and agency personnel will no longer be able to access the account.
10. When logging back into the website under the Agency Administrator account, you will be prompted to complete your profile and change your password.
 - Review the general information about your account – click “Next”
 - In the password section, click “Update” to change your password and set your recovery question.
 - In the Marketing section, click “Update”. Select your line of business. NOTE: as a Producer or Principal, licensing information will be required.

At this point the Agency Administrator role has been created. The Administrator role has the ability to create additional users as well as disable any other Administrator account. They have no restrictions as to what information can be accessed on the website. The Agency Administrator can now create individual user accounts for the remainder of agency staff. The Agency Administrator is the only role that has permissions to create individual user accounts. To create additional users, log in as the Agency Administrator and follow the remaining instructions in this document.

User Account Setup

To create additional users or Agency Administrators, click on the “Add a New User” button. When adding new users, the Agency Administrator will be able to determine the permission levels for each individual user account created.

NOTE: Remember to create a generic password for each user as they will be asked to change it when they log in for the first time.

Permissions

Agent Type	
Agency Administrator	Agency Administrators have no restrictions
User Account	User Accounts can be assigned any of the permissions below.
Agency Permissions	*All permissions are limited to the agency number(s) assigned to the user.
Access Policy Express	Users can access our Policy Express quoting and issuance system.

View/Update Agency Bank Account Information	Users can update the Bank Accounts used for EFT payments.
Billing Inquiry and Transaction Detail	Users can use the Account Billing Inquiry search and look at transaction information for any accounts found.
Claims Inquiry	Users can use the Claims Inquiry system to look up claims information on a policy.
View Electronic Documents / Transaction Search	Users can use the Document Search and the Transaction Search record lookup tools.
View Incentive Trip Reports	Users can view the Incentive Trip reports.
View Production Reports	Users can view the Agency Production Reports .
Order Co-op Advertising Materials	Everyone can see these, but only users with this permission can place orders for our Personalized Advertising Materials
Make Online Payments	Users can make Online Payments for the agency and any accounts or policies.
Extra	
Must Change Password	This forces the user to change their password the next time they log in. This is mandatory when you add a new user.

When individual users log in for the first time, they will be prompted to do the following:

1. Change their password
2. Verify their user information
3. Input their marketing information: primary line of business and any licensing information

User Account Management

The Agency Administrator will also have the ability to manage agency users. Below is a screen shot of the User Account Management screen:

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[+ Add a New User](#)

1. To edit a user, select the “Edit” button to make changes to each user’s details including the following:
 - a. Disable an account – this will prevent the user from having permissions to log into the website
 - b. Update user’s information
 - c. Reset user’s password which will then email the new password directly to the user
 - d. Add or delete agency codes for which the user has permissions. Selections made here will control what agency codes each user’s have access to. Remember, selecting a primary agency number simply sets that address as the user’s primary address.

Agency Numbers

Agency #	Is Primary
000	Yes
000	✓ Make Primary - Delete

- select an agency number - [+ Add Agency Number](#)

2. To delete a user, select “Delete” next to the selected user’s name. You will be prompted to confirm if the user’s license should be cancelled with HMIC.

User History

When viewing the recent user activity, the 20 most recent activity items will appear.

Action	Description	Time	User
Log out	gilligan5044 logged out	5/21/2014 10:44:40 AM	gilligan5044
Remove Role/Permission	Removed "Must Change Password"	5/21/2014 10:42:25 AM	gilligan5044
Change Password	Password updated	5/21/2014 10:42:25 AM	gilligan5044
Logged In	gilligan5044 logged in to the website.	5/21/2014 10:42:14 AM	gilligan5044
Add Role/Permission	Added "Visible in User Account Maintenance panel"	5/21/2014 10:18:09 AM	0005044
Primary Agency Number	0005044 was added as the primary agency number.	5/21/2014 10:18:09 AM	0005044
Add Role/Permission	Added "Must Change Password"	5/21/2014 10:18:08 AM	0005044
Add Role/Permission	Added "Agent"	5/21/2014 10:18:08 AM	0005044
Add Role/Permission	Added "Canupdateaccount"	5/21/2014 10:18:08 AM	0005044