

TRANSAMERICA AGENT HOME

DELEGATE EXPERIENCE FAQ

Agent Home on secure.transamerica.com provides delegates and agents access to Life agent websites via a single landing page tailored to their needs. With a single click, they can toggle between portals with increased speed and without providing additional login verification. Here are a few quick tips to help you get started.

Q1. How do agents give access to delegates?

A. Here's a step-by-step guide for how agents can give access to delegates.

- [TAN guide](#)
- [Brokerage guide](#)

Q2. How do delegates create an account on Agent Home?

A. If they already created an account with Transamerica for another agent, they can log in to Agent Home on secure.transamerica.com to see all the agents they support. Delegates will receive an email from us every time an agent gives them access.

If they haven't created an account with us, first, an agent must give access to them using the steps in question 1. After that, the delegate will receive an email from Transamerica with instructions on creating an account. Delegates only need to create an account once, not every time an agent gives them access.

Q3. What if the delegate can't find their registration email?

A. If delegates can't find their registration email, they can contact their agent for help. The agent can go through the steps in question 1 to re-add the delegate.

Q4. How are delegates notified when assigned to an agent or agency profile?

A. Delegates will receive an email from us every time an agent adds them.

Q5. How long will it take to access a profile once a delegate has been assigned?

A. As soon as the delegate creates an account or gets associated with the agent.

Q6. What features do delegates have access to?

A. The features that delegates have access to are dependent on what entitlements the agent gives to the delegate. Agents can give entitlements to these sites: TransACT, TA ANI, TA Premier, ANI, and Transamerica Life Access.

Q7. What happens if a delegate is already a delegate for an agent on a legacy portal but not Agent Home yet?

A. For agents: There will be a one-time data load for agents to approve the associated delegates to Agent Home. After that, agents can add delegates using the directions in question 1.

For delegates: Delegate will need to create an account on Agent Home on secure.transamerica.com using the directions in question 2. If they already have an account, they can directly log in.

Q8. How do agents reassign a delegate?

A. Agents can edit a delegate profile, assign certain entitlements, or delete a delegate profile, which disassociates that delegate from that agent.

Q9. How does this affect Transamerica's pre-issue support from contract and licensing, new business, and underwriting?

A. This does not impact pre-issue. This delegate feature is only for service legacy portals, not iGO® e-App or Transamerica Life Illustrator.

Q10. Do I need to do anything differently if there is more than one writing agent (i.e., for businesses with multiple agents, how do the permissions work)?

A. Once the agent assigns the delegate, the delegate can register or view based on the entitlements the agent has provided them.

Q11. Does each agent need to assign their delegate access to see their business?

A. Yes, each agent needs to assign each delegate specific entitlements.

Q12. Can delegates edit their profile?

A. Yes, delegates can update the profile except for their delegate ID and last name. Also, their date of birth cannot be updated after the delegate confirms it on their first time logging in.

Q13. Who can agents and delegates call for existing portal support?

A. Call us at one of the numbers below:

- Agent Net Info (ANI) and TA ANI: 866-303-7833
- Individual Brokerage agents for Agent + Advisor portal: 866-301-2473
- Individual Brokerage agents and agencies for TransAct® help: 800-742-7005
- Transamerica Agency Network agents for TA ANI, TransAct®, and TA Premier help: 800-779-5502

Q14. Who can TAN Agents email to report a technical issue?

A. Email us at tantechsolutions@transamerica.com.

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